

# 2024 GLOBAL MANUFACTURING & MARKETS

Equipment Type: Continuous mining machines, borer, ripper, auger, and drum, including roadheading machines

Industry: Mining machinery and equipment manufacturing

Equipment Code: 3331311101

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# 2024

- *Market Reports*
- *Industry Trends*
- *Demographic Data*

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# Table of Contents

**Equipment Type: Continuous mining machines, borer, ripper, auger, and drum, including roadheading machines**

**Industry: Mining machinery and equipment**

## TABLE OF CONTENTS

**Definition and Methodology**

**Global Markets (Summary)**

**Regional Markets**

<b>Country Name</b>	<b>Country Code</b>	<b>Country Name</b>	<b>Country Code</b>
Afghanistan	AFG	Cote d'Ivoire	CIV
Albania	ALB	Croatia	HRV
Algeria	DZA	Cuba	CUB
Angola	AGO	Cyprus	CYP
Argentina	ARG	Czech Republic	CZE
Armenia	ARM	Denmark	DNK
Australia	AUS	Dominican Republic	DOM
Austria	AUT	Ecuador	ECU
Azerbaijan	AZE	Egypt, Arab Rep.	EGY
Bahamas, The	BHS	El Salvador	SLV
Bahrain	BHR	Equatorial Guinea	GNQ
Bangladesh	BGD	Estonia	EST
Belarus	BLR	Ethiopia	ETH
Belgium	BEL	Finland	FIN
Bolivia	BOL	France	FRA
Bosnia and Herzegovina	BIH	Gabon	GAB
Botswana	BWA	Georgia	GEO
Brazil	BRA	Germany	DEU
Brunei Darussalam	BRN	Ghana	GHA
Bulgaria	BGR	Greece	GRC
Burkina Faso	BFA	Guam	GUM
Burundi	BDI	Guatemala	GTM
Cambodia	KHM	Guinea	GIN
Cameroon	CMR	Haiti	HTI
Canada	CAN	Honduras	HND
Chad	TCD	Hong Kong SAR, China	HKG
Chile	CHL	Hungary	HUN
China	CHN	Iceland	ISL
Colombia	COL	India	IND
Congo, Dem. Rep.	COD	Indonesia	IDN
Congo, Rep.	COG	Iran, Islamic Rep.	IRN
Costa Rica	CRI	Iraq	IRQ

# Table of Contents

**Equipment Type: Continuous mining machines, borer, ripper, auger, and drum, including roadheading machines**

**Industry: Mining machinery and equipment**

<b>Country Name</b>	<b>Country Code</b>	<b>Country Name</b>	<b>Country Code</b>
Ireland	IRL	New Zealand	NZL
Israel	ISR	Nicaragua	NIC
Italy	ITA	Nigeria	NGA
Jamaica	JAM	Norway	NOR
Japan	JPN	Oman	OMN
Jordan	JOR	Pakistan	PAK
Kazakhstan	KAZ	Panama	PAN
Kenya	KEN	Papua New Guinea	PNG
Korea, Rep.	KOR	Paraguay	PRY
Kosovo	XKX	Peru	PER
Kuwait	KWT	Philippines	PHL
Kyrgyz Republic	KGZ	Poland	POL
Lao PDR	LAO	Portugal	PRT
Latvia	LVA	Puerto Rico	PRI
Lebanon	LBN	Qatar	QAT
Lithuania	LTU	Romania	ROU
Luxembourg	LUX	Russian Federation	RUS
Macao SAR, China	MAC	Saudi Arabia	SAU
Macedonia, FYR	MKD	Senegal	SEN
Madagascar	MDG	Serbia	SRB
Malaysia	MYS	Singapore	SGP
Mali	MLI	Slovak Republic	SVK
Malta	MLT	Slovenia	SVN
Mauritius	MUS	South Africa	ZAF
Mexico	MEX	South Sudan	SSD
Moldova	MDA	Spain	ESP
Mongolia	MNG	Sri Lanka	LKA
Morocco	MAR	Sudan	SDN
Mozambique	MOZ	Sweden	SWE
Myanmar	MMR	Switzerland	CHE
Namibia	NAM	Tanzania	TZA
Nepal	NPL	Thailand	THA
Netherlands	NLD	Trinidad and Tobago	TTO

# Table of Contents

***Equipment Type: Continuous mining machines, borer, ripper, auger, and drum, including roadheading machines***

***Industry: Mining machinery and equipment***

<b>Country Name</b>	<b>Country Code</b>		
Tunisia	TUN	Uruguay	URY
Turkey	TUR	Uzbekistan	UZB
Turkmenistan	TKM	Venezuela, RB	VEN
Uganda	UGA	Vietnam	VNM
Ukraine	UKR	West Bank and Gaza	PSE
United Arab Emirates	ARE	Yemen, Rep.	YEM
United Kingdom	GBR	Zambia	ZMB
United States	USA	Zimbabwe	ZWE

# Users' Guide

***Equipment Type: Continuous mining machines, borer, ripper, auger, and drum, including roadheading machines***

***Industry: Mining machinery and equipment manufacturing***

## **About this Report**

This report covers the global forecast for continuous mining machines, borer, ripper, auger, and drum, including roadheading machines produced in the continuous mining machines, borer, ripper, auger, and drum, including roadheading machines industry.

More than 140 countries are featured in this report as well as global and regional summaries. Estimates on equipment or material sales (product shipments value) are published for six historical years and two forecast years. Product shipments include the total value of all products produced and shipped by all producers. For selected products, this can represent value of receipts, value of production, or value of work done.

These estimates product shipment values are also considered "market potentials" because the calculations assume efficient, free markets. Estimates can vary in countries with inefficient, closed markets with such issues as oppressive regulations and tariffs, black markets, and political problems impacted a regular business cycle.

Published annually, this report provides a unique and accurate estimate on market sizing for this equipment/material using a proprietary economic model that integrates historical trends (horizontal analysis) and longitudinal analysis of incorporated industries (vertical analysis).

Product shipments value are presented in US Dollars and local currency units for historical and forecast years.

Regional summaries include North America, Europe, Asia-Pacific, Latin America, Africa, and Middle East. Percent shares are presented for each region as a share of the global market.

Product shipments values are also broken down by related costs, such as cost of materials, cost of fuels/electricity and value added, as well as capital expenditures, such as expenditures on buildings, machinery, vehicles and computers.

This report does not list key players/companies in the market but focuses on a top-down and outlook view of the market despite the existing and entering of market companies.

# Users' Guide

## Users' Guide

Barnes Reports is a leading publisher of industry studies on U.S. and global industries and forecasts sales and employment demographics. As a way of making the most of this information, we have included a few suggestions and tips to aid users in processing and using this information.

Managers, planners, and market researchers use this information for a variety of activities:

- Sizing markets and segments – You can estimate the size of the regional markets you sell in and your company's market penetration into that market. You can do the same with the market segments in which you participate.
- Sales territory potential – You can estimate your market penetration and also the market potential in any regional area or market segment.
- Sales forecasting – With the estimates on the size of the industry, market researchers supporting a sales force can then estimate and forecast the future size of the industry.
- Advertising strategies – You can use this information for forecasting and estimating sales potential and target advertising campaigns.
- Competitive analysis – You will use the information to locate your possible competitors (if it is not already known), to estimate their size, growth and strengths and weaknesses and to see what market segments in which they participate.

We recognize that many managers today are asked to provide detailed analysis of their markets, sales territories, distribution channels, and product placements. We have organized these reports in a logical format making your market analysis and research tasks easy to accomplish.



# Definitions & Methodology

**Equipment Type:** *Continuous mining machines, borer, ripper, auger, and drum, including roadheading machines*

**Industry:** *Mining machinery and equipment manufacturing*

## Definitions

The equipment described in this report are primarily defined by its title since the title is generally long and includes most of the criteria used to differentiate the equipment from other similar equipment. The equipment descriptions are sourced from the U.S. Census. Additionally descriptions can be collected from the manufacturing industry descriptions that each equipment is categorized. The U.S. Census manufacturing industry descriptions for equipment are listed below:

### **NAICS 33311-Agricultural implement manufacturing**

This industry comprises establishments primarily engaged in manufacturing farm machinery and equipment, powered mowing equipment and other powered home lawn and garden equipment. *Cross-References.* Establishments primarily engaged in-- Manufacturing agricultural handtools and nonpowered lawnmowers--are classified in Industry 33221, Cutlery and Handtool Manufacturing; Manufacturing farm conveyors--are classified in Industry 33392, Material Handling Equipment Manufacturing; and

### **NAICS 33312-Construction machinery manufacturing**

This industry comprises establishments primarily engaged in manufacturing construction machinery, surface mining machinery, and logging equipment.

### **NAICS 33313-Mining and oil and gas field machinery manufacturing**

This industry comprises establishments primarily engaged in manufacturing oil and gas field and underground mining machinery and equipment. *Cross-References.* Establishments primarily engaged in-- Manufacturing offshore oil and gas well drilling and production floating platforms--are classified in Industry 33661, Ship and Boat Building; Manufacturing coal and ore conveyors--are classified in Industry 33392, Material Handling Equipment Manufacturing; Manufacturing underground mining locomotives--are classified in Industry 33651, Railroad Rolling Stock Manufacturing; and

# Definitions & Methodology

**Equipment Type: Continuous mining machines, borer, ripper, auger, and drum, including roadheading machines**

## **NAICS 33324-Industrial machinery manufacturing**

This industry comprises establishments primarily engaged in manufacturing industrial machinery, such as food and beverage manufacturing machinery, semiconductor manufacturing machinery, sawmill and woodworking machinery (except handheld), machinery for making paper and paper products, printing and binding machinery and equipment, textile making machinery, and machinery for making plastics and rubber products.

### *Cross-References*

Establishments primarily engaged in--

Manufacturing agricultural and farm-type, construction, and mining machinery--are classified in Industry Group 3331, Agriculture, Construction, and Mining Machinery Manufacturing;

Manufacturing food and beverage packaging machinery or power-driven handtools--are classified in Industry 33399, All Other General Purpose Machinery Manufacturing;

Manufacturing commercial and industrial refrigeration and freezer equipment--are classified in Industry 33341, Ventilation, Heating, Air-Conditioning, and Commercial Refrigeration Equipment Manufacturing;

## **NAICS 33331-Commercial and service industry machinery manufacturing**

This industry comprises establishments primarily engaged in manufacturing commercial and service machinery, such as optical instruments, photographic and photocopying equipment, automatic vending machinery, commercial laundry and dry-cleaning machinery, office machinery, automotive maintenance equipment (except mechanic's handtools), and commercial-type cooking equipment.

### *Cross-References*

Establishments primarily engaged in--

Manufacturing household-type appliances--are classified in Industry Group 3352, Household Appliance Manufacturing;

Manufacturing computer and peripheral equipment (including point-of-sale terminals and automatic teller machines (ATMs))--are classified in Industry 33411, Computer and Peripheral Equipment Manufacturing;

Manufacturing facsimile equipment--are classified in Industry 33421, Telephone Apparatus Manufacturing;

Manufacturing timeclocks, timestamps, and electron and proton microscopes--are classified in Industry 33451, Navigational, Measuring, Electromedical, and Control Instruments Manufacturing;

Manufacturing pencil sharpeners and staplers--are classified in Industry 33994, Office Supplies (except Paper) Manufacturing;

Manufacturing sensitized film, paper, cloth, and plates, and prepared photographic chemicals--are classified in Industry 32599, All Other Chemical Product and Preparation Manufacturing;

Manufacturing ophthalmic focus lenses--are classified in Industry 33911, Medical Equipment and Supplies Manufacturing;

Manufacturing television and video cameras--are classified in Subsector 334, Computer and Electronic Product Manufacturing;

# Definitions & Methodology

**Equipment Type: Continuous mining machines, borer, ripper, auger, and drum, including roadheading machines**

## **NAICS 33341-Ventilation, heating, air-conditioning, and commercial refrigeration equipment manufacturing**

This industry comprises establishments primarily engaged in manufacturing ventilating, heating, air-conditioning, and commercial and industrial refrigeration and freezer equipment.

*Cross-References.* Establishments primarily engaged in--

Manufacturing household-type fans (except attic), portable electric space heaters, humidifiers, dehumidifiers, and air purification equipment--are classified in Industry 33521, Small Electrical Appliance Manufacturing;

Manufacturing household-type appliances, such as cooking stoves, ranges, refrigerators, and freezers--are classified in Industry 33522, Major Appliance Manufacturing;

Manufacturing commercial-type cooking equipment--are classified in Industry 33329, Other Industrial Machinery Manufacturing;

Manufacturing industrial, power, and marine boilers--are classified in Industry 33241, Power Boiler and Heat Exchanger Manufacturing;

## **NAICS 33351-Metalworking machinery manufacturing**

This industry comprises establishments primarily engaged in manufacturing metalworking machinery, such as metal cutting and metal forming machine tools; cutting tools; and accessories for metalworking machinery; special dies, tools, jigs, and fixtures; industrial molds; rolling mill machinery; assembly machinery; coil handling, conversion, or straightening equipment; and wire drawing and fabricating machines.

*Cross-References.* Establishments primarily engaged in--

Manufacturing handtools (except power-driven), cutting dies (except metal cutting), sawblades, and handsaws--are classified in Industry 33221, Cutlery and Handtool Manufacturing;

Manufacturing casting molds for heavy steel ingots--are classified in Industry 33151, Ferrous Metal Foundries; and

Manufacturing power-driven handtools and welding and soldering equipment--are classified in Industry 33399, All Other General Purpose Machinery Manufacturing.

## **NAICS 33361-Engine, turbine, and power transmission equipment manufacturing**

This industry comprises establishments primarily engaged in manufacturing turbines, power transmission equipment, and internal combustion engines (except automotive gasoline and aircraft).

*Cross-References.* Establishments primarily engaged in--

Manufacturing motor vehicle power transmission equipment--are classified in Industry 33635, Motor Vehicle Transmission and Power Train Parts Manufacturing;

Manufacturing aircraft engines and aircraft power transmission equipment--are classified in Industry 33641, Aerospace Product and Parts Manufacturing;

Manufacturing ball and roller bearings--are classified in Industry 33299, All Other Fabricated Metal Product Manufacturing;

Manufacturing gasoline automotive engines--are classified in Industry 33631, Motor Vehicle Gasoline Engine and Engine Parts Manufacturing; and

# Definitions & Methodology

**Equipment Type: Continuous mining machines, borer, ripper, auger, and drum, including roadheading machines**

## **NAICS 33391-Pump and compressor manufacturing**

This industry comprises establishments primarily engaged in manufacturing pumps and compressors, such as general purpose air and gas compressors, nonagricultural spraying and dusting equipment, general purpose pumps and pumping equipment (except fluid power pumps and motors), and measuring and dispensing pumps.

*Cross-References.* Establishments primarily engaged in--

Manufacturing fluid power pumps and motors and handheld pneumatic spray guns--are classified in Industry 33399, All Other General Purpose Machinery Manufacturing;

Manufacturing agricultural spraying and dusting equipment--are classified in Industry 33311, Agricultural Implement Manufacturing;

Manufacturing laboratory vacuum pumps--are classified in Industry 33911, Medical Equipment and Supplies Manufacturing;

Manufacturing pumps and air-conditioning systems and compressors for motor vehicles--are classified in Industry Group 3363, Motor Vehicle Parts Manufacturing; and

## **NAICS 33392-Material handling equipment manufacturing**

This industry comprises establishments primarily engaged in manufacturing material handling equipment, such as elevators and moving stairs; conveyors and conveying equipment; overhead traveling cranes, hoists, and monorail systems; and industrial trucks, tractors, trailers, and stacker machinery.

*Cross-References.* Establishments primarily engaged in--

Manufacturing motor vehicle-type trailers--are classified in Industry 33621, Motor Vehicle Body and Trailer Manufacturing;

Manufacturing farm-type tractors--are classified in Industry 33311, Agricultural Implement Manufacturing;

Manufacturing construction-type tractors and cranes--are classified in Industry 33312, Construction Machinery Manufacturing; and

Manufacturing power transmission pulleys--are classified in Industry 33361, Engine, Turbine, and Power Transmission Equipment Manufacturing.

## **NAICS 33399-All other general purpose machinery manufacturing**

This industry comprises establishments primarily engaged in manufacturing general purpose machinery (except ventilation, heating, air-conditioning, and commercial refrigeration equipment; metal working machinery; engines, turbines, and power transmission equipment; pumps and compressors; and material handling equipment).

*Cross-References.* Establishments primarily engaged in--

Manufacturing ventilating, heating, air-conditioning (except motor vehicle), commercial refrigeration, and furnace filters--are classified in Industry 33341, Ventilation, Heating, Air-Conditioning, and Commercial Refrigeration Equipment Manufacturing;

Manufacturing metalworking machinery--are classified in Industry Group 3335, Metalworking Machinery Manufacturing;

# Definitions & Methodology

## ***Equipment Type: Continuous mining machines, borer, ripper, auger, and drum, including roadheading machines***

Manufacturing engine, turbine, and power transmission equipment--are classified in Industry Group 3336, Engine, Turbine, and Power Transmission Equipment Manufacturing;  
Manufacturing pumps and compressors--are classified in Industry 33391, Pump and Compressor Manufacturing;  
Manufacturing material handling equipment--are classified in Industry 33392, Material Handling Equipment Manufacturing;

## **Methodology**

Barnes Reports' Global Manufacturing & Markets report series provide estimates of the size and characteristics of the largest equipment, materials and consumables by manufacturing industries in the largest 140 global countries. These estimates are produced by a proprietary economic model that is based on a number of sources and factors:

1. The size of U.S. manufacturing equipment, materials and consumables from the U.S. Economic Census over the last twenty years.
2. Estimate current and forecast size of U.S. equipment, materials and consumables using regression analysis.
3. Adjust estimates and forecasts using the most current U.S. manufacturing industry data and trends. This adjustment adds vertical (industry) analysis to the forementioned horizontal (trend) analysis.
4. Global estimates use trend GDP data and the ratio of manufacturing industries to GDP by country from World Bank databases to compare U.S. versus global countries size and trends.

# Global Markets

**Equipment Type: Continuous mining machines, borer, ripper, auger, and drum, including roadheading machines**

**Market Size by Year (US\$ Millions)**

Country Name	2018	2019	2020	2021	2022	2023	2024	2025
Argentina	41.1	40.5	56.1	61.0	62.8	72.5	81.7	91.0
Australia	51.6	55.2	70.3	69.7	71.9	83.9	95.3	106.5
Austria	48.1	51.8	66.0	64.3	68.2	79.0	89.1	98.9
Bangladesh	30.7	40.1	72.1	71.5	85.3	111.2	140.4	173.1
Belgium	41.6	45.4	60.5	59.2	62.9	74.3	85.4	96.4
Brazil	115.0	133.3	131.1	136.4	133.6	147.8	160.1	171.7
Canada	131.6	149.9	189.5	199.1	208.1	247.4	286.3	325.0
Chile	19.6	19.8	21.1	22.0	21.8	24.2	26.5	28.6
China	2,411.1	2,676.2	3,615.4	3,970.7	4,293.0	5,263.6	6,262.5	7,262.6
Czech Republic	35.2	40.0	50.3	48.0	52.6	62.8	72.9	82.6
Denmark	28.8	33.3	46.5	38.5	43.1	51.5	59.9	68.3
Egypt, Arab Rep.	25.3	33.8	56.0	53.2	62.6	78.0	94.2	110.9
Finland	25.3	27.1	36.3	35.3	37.6	44.0	50.2	56.2
France	171.9	191.2	231.3	212.4	225.7	256.0	283.0	307.8
Germany	502.3	527.9	654.5	649.7	678.7	780.3	873.5	960.3
Hungary	18.3	20.2	25.7	24.9	26.6	31.6	36.4	41.0
India	246.6	267.8	341.8	368.8	379.4	446.5	511.5	575.1
Indonesia	129.0	154.3	197.0	184.7	200.4	234.8	268.0	300.1
Ireland	77.3	89.4	137.7	141.2	165.3	212.7	265.4	323.3
Israel	27.6	30.0	43.2	40.2	43.9	49.4	54.7	59.5
Italy	195.0	208.9	263.0	258.4	267.3	311.5	354.2	397.1
Japan	640.7	731.8	932.1	829.2	898.0	1,025.0	1,141.6	1,253.4
Korea, Rep.	285.8	291.9	380.6	373.0	382.5	433.3	478.5	520.0
Malaysia	48.2	54.7	70.3	70.8	77.0	92.8	108.9	125.5
Mexico	131.8	153.9	175.5	186.1	191.4	224.6	257.0	289.8
Netherlands	63.3	68.6	92.1	88.7	96.5	115.6	134.7	153.8
Nigeria	23.9	36.1	51.3	52.1	61.8	77.5	94.4	113.1
Norway	16.0	17.9	22.1	22.3	23.1	26.5	29.6	32.5
Pakistan	23.9	24.3	32.1	33.6	33.9	39.2	44.0	48.7
Philippines	41.3	48.8	59.8	56.2	61.5	72.1	82.7	92.9
Poland	61.4	69.4	89.5	91.9	99.3	119.9	140.7	161.3
Puerto Rico	29.8	34.7	46.6	39.4	43.3	49.3	54.8	60.0
Romania	28.2	29.9	38.0	38.2	41.6	49.5	57.1	64.8
Russian Federation	135.6	153.4	187.2	191.2	202.9	221.8	237.0	250.3
Saudi Arabia	62.8	69.6	79.8	95.1	97.6	118.8	140.7	163.4
Singapore	48.2	51.0	64.5	71.3	76.3	92.9	110.5	128.9
South Africa	27.0	29.0	36.9	39.9	40.8	47.9	54.8	61.6
Spain	99.4	106.8	132.3	133.2	138.0	160.9	183.1	205.4
Sweden	45.1	47.8	61.5	63.6	64.3	74.7	84.5	93.8

# Global Markets

**Equipment Type: Continuous mining machines, borer, ripper, auger, and drum, including roadheading machines**

**Market Size by Year (US\$ Millions)**

Country Name	2018	2019	2020	2021	2022	2023	2024	2025
Switzerland	80.0	93.3	127.8	116.5	129.7	155.4	181.3	207.1
Thailand	84.4	97.6	119.3	111.1	123.0	142.0	159.9	177.2
Turkey	91.6	97.4	129.0	147.1	148.8	173.1	197.4	222.3
United Arab Emirates	23.0	25.7	32.5	34.8	36.6	43.2	49.7	56.4
United Kingdom	157.6	172.0	224.6	219.6	231.9	269.8	305.7	340.1
United States	1,427.1	1,639.2	2,189.0	2,019.9	2,258.4	2,635.2	2,995.1	3,343.2
Venezuela, RB	24.5	26.1	33.2	27.2	28.2	31.4	34.2	36.9
Vietnam	24.4	30.2	53.0	72.9	81.9	107.2	135.9	168.1
Rest of World	450.9	502.1	638.9	663.1	704.5	833.0	961.4	1,092.1
GLOBAL	8,548.7	9,539.6	12,464.9	12,597.0	13,563.8	16,095.8	18,606.6	21,098.8

Source: Barnes Reports

\*2023-2025 Forecasts

# Global

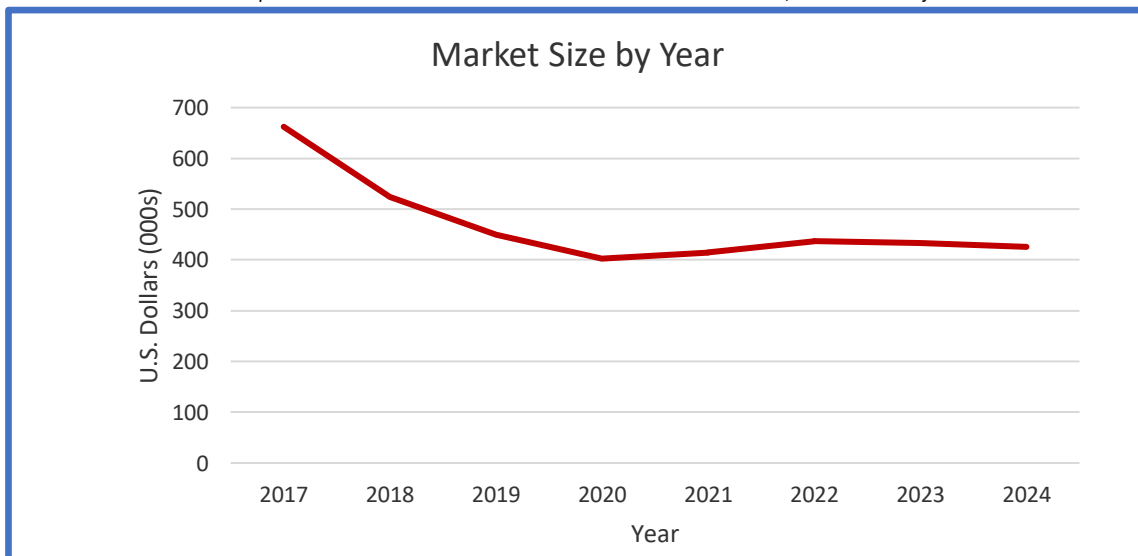
**Product/Service Type: Continuous mining machines, borer, ripper, auger, and drum, including roadheading machines**

The market for this equipment worldwide is estimated to be \$18,606.6 million dollars in 2024 and is expected to change by 13.4 percent from 2024 to 2025.

Market Sales (000s)		
Year	US Dollars	
2018	8,548,651.7	8,548,651.7
2019	9,539,608.9	9,539,608.9
2020	12,464,930.9	12,464,930.9
2021	12,597,046.8	12,597,046.8
2022	13,563,773.1	13,563,773.1
2023	16,095,819.0	16,095,819.0
2024	18,606,576.5	18,606,576.5
2025	21,098,790.4	21,098,790.4
2030	32,609,359.8	32,609,359.8
Y-to-Y Change	US Dollars	
2018-2019	11.6%	
2019-2020	30.7%	
2020-2021	1.1%	
2021-2022	7.7%	
2022-2023	18.7%	
2023-2024	15.6%	
2024-2025	13.4%	
CAGR 2025-2030	10.9%	

Source: Barnes Reports

\*2024-2023 Forecasts; 2025-2030 Projections





# Global

**Product/Service Type: Continuous mining machines, borer, ripper, auger, and drum, including roadheading machines**

## Operating Costs Estimates

The annual payroll for this market worldwide will be \$8,559.03 million dollars in 2024 and the lease and rental payments for the market will be \$930.33 million dollars. The operating expenses for this market is expected to reach \$13,992.15 million dollars in 2024.

<b>2024 Operating Costs</b>	<b>US Dollars (000s)</b>
Annual Payroll (\$1,000)	8,559,025.2
Operating Expenses (\$1,000)	13,992,145.5
Employer Costs for Fringe Benefits (\$1,000)	1,358,280.1
Contract Labor Costs including Temporary Help (\$1,000)	576,803.9
Cost of Insurance (\$1,000)	260,492.1
Taxes and License Fees (\$1,000)	130,246.0
Lease and Rental Payments (\$1,000)	930,328.8

## Cost of Services Estimates

The cost of transportation for this market worldwide will be \$186.07 million dollars in 2024 and the cost of printing services for the market will be \$130.25 million dollars. The cost of repair and maintenance for this market is expected to reach \$93.03 million dollars in 2024.

<b>2024 Cost of Services</b>	<b>US Dollars (000s)</b>
Cost of Purchased Transportation and Warehousing (\$1,000)	186,065.8
Cost of Purchased Repair and Maintenance Services (\$1,000)	93,032.9
Cost of Purchased Printing Services (\$1,000)	130,246.0
Cost of Purchased Advertising and Promotional Services (\$1,000)	260,492.1
Cost of Purchased Legal Services (\$1,000)	148,852.6
Cost of Purchased Accounting and Auditing Services (\$1,000)	93,032.9

\*2024-2025 Forecasts

Source: Barnes Reports

# Regional Markets

**Equipment Type: Continuous mining machines, borer, ripper, auger, and drum, including roadheading machines**

The market for this equipment in North America is estimated to be \$3.5 billion dollars in 2024 and is expected to change by 13.9 percent from 2023 to 2024. The market in the Asia-Pacific region for this equipment is estimated to be \$9.5 billion in 2024 and is forecast to change by 16.6 percent from 2024 to 2025. The European market is \$2.9 billion in 2024.

## Market Size by Year (US\$ Millions)

	2018	2019	2020	2021	2022	2023	2024	2025
North America	1,690.5	1,943.0	2,554.1	2,405.1	2,657.9	3,107.2	3,538.4	3,957.9
Latin America	156.1	173.9	187.2	197.4	196.4	220.3	241.8	262.8
Europe	1,468.0	1,596.2	2,045.3	1,997.3	2,128.1	2,495.7	2,852.2	3,202.5
Asia-Pacific	4,146.4	4,607.1	6,070.4	6,330.2	6,799.9	8,147.9	9,500.5	10,841.4
Middle East	177.3	192.7	241.3	277.1	283.0	335.1	387.9	442.1
Africa	51.0	65.2	88.2	92.1	102.7	125.5	149.3	174.8
GLOBAL	7,638.3	8,512.8	11,098.2	11,207.1	12,065.3	14,306.3	16,520.7	18,706.7

## Regional Distribution

	2018	2019	2020	2021	2022	2023	2024	2025
North America	22.1%	22.8%	23.0%	21.5%	22.0%	21.7%	21.4%	21.2%
Latin America	2.0%	2.0%	1.7%	1.8%	1.6%	1.5%	1.5%	1.4%
Europe	19.2%	18.8%	18.4%	17.8%	17.6%	17.4%	17.3%	17.1%
Asia-Pacific	54.3%	54.1%	54.7%	56.5%	56.4%	57.0%	57.5%	58.0%
Middle East	2.3%	2.3%	2.2%	2.5%	2.3%	2.3%	2.3%	2.4%
Africa	0.7%	0.8%	0.8%	0.8%	0.9%	0.9%	0.9%	0.9%
GLOBAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

## Year-to-Year Change

	2018-2019	2019-2020	2020-2021	2021-2022	2022-2023	2023-2024	2024-2025
North America	14.9%	31.4%	-5.8%	10.5%	16.9%	13.9%	11.9%
Latin America	11.4%	7.7%	5.5%	-0.5%	12.2%	9.7%	8.7%
Europe	8.7%	28.1%	-2.3%	6.6%	17.3%	14.3%	12.3%
Asia-Pacific	11.1%	31.8%	4.3%	7.4%	19.8%	16.6%	14.1%
Middle East	8.7%	25.2%	14.8%	2.1%	18.4%	15.7%	14.0%
Africa	27.9%	35.4%	4.4%	11.5%	22.2%	19.0%	17.1%
GLOBAL	11.4%	30.4%	1.0%	7.7%	18.6%	15.5%	13.2%

Source: Barnes Reports

\*2023-2025 Forecasts

# Argentina

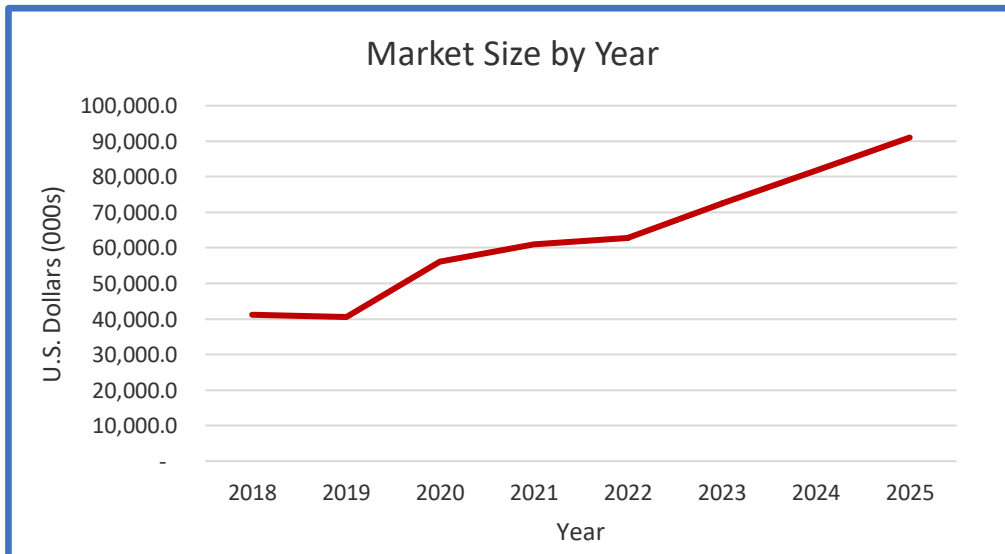
**Equipment Type: Continuous mining machines, borer, ripper, auger, and drum, including roadheading machines**

The market for this equipment in Argentina is estimated to be \$81.7 million dollars in 2024 and is expected to change by 11.5 percent from 2024 to 2025. The market will be 10460.4 million Pesos in 2024 and is forecast to change by 21.9 percent from 2024 to 2025.

Market Sales (000s)		
Year	US Dollars	Pesos
2018	41,120.9	1,155,292.5
2019	40,541.8	1,952,000.8
2020	56,072.3	3,955,292.4
2021	61,003.8	5,794,793.7
2022	62,817.3	6,832,554.5
2023	72,477.3	8,579,333.5
2024	81,670.5	10,460,378.3
2025	91,043.3	12,465,056.2
2030	132,456.3	19,634,032.9
Y-to-Y Change	US Dollars	Pesos
2018-2019	-1.4%	69.0%
2019-2020	38.3%	102.6%
2020-2021	8.8%	46.5%
2021-2022	3.0%	17.9%
2022-2023	15.4%	25.6%
2023-2024	12.7%	21.9%
2024-2025	11.5%	19.2%
CAGR 2025-2030	9.1%	57.5%

Source: Barnes Reports

\*2023-2024 Forecasts; 2025-2030 Projections



# Argentina

**Equipment Type: Continuous mining machines, borer, ripper, auger, and drum, including roadheading machines**

## Costs and Value Added Estimates

The total cost of materials for this market in Argentina will be \$36.05 million dollars in 2024 and the value added amount for the market will be \$40.21 million dollars. The cost of resales for this equipment is expected to reach \$3.17 million dollars in 2024.

<b>2024 Costs and Value Added</b>	<b>US Dollars (000s)</b>
Total cost of materials (\$1,000)	36,054.69
Cost of resales (\$1,000)	3,166.52
Cost of purchased fuels consumed (\$1,000)	113.80
Cost of purchased electricity (\$1,000)	456.50
Cost of contract work (\$1,000)	1,196.03
Value of resales (\$1,000)	4,565.55
Value added (\$1,000)	40,210.77

## Capital Expenses Estimates

The total capital expenses for this market in Argentina will be \$1.94 million dollars in 2024 and the expenditures for machinery and equipment for the market will be \$1.61 million dollars. The expenditures for buildings for this equipment expected to reach \$0.33 million dollars in 2024.

<b>2024 Capital Expenses</b>	<b>US Dollars (000s)</b>
Total capital expenditures (\$1,000)	1,938.93
Capital expenditures for buildings and other structures (\$1,000)	327.46
Capital expenditures for machinery and equipment (\$1,000)	1,611.47
Capital expenditures for automobiles, trucks, etc. (\$1,000)	69.53
Capital expenditures for computers and peripheral equip. (\$1,000)	92.94
Capital expenditures for all other machinery and equip. (\$1,000)	1,449.00

\*2023-2024 Forecasts

Source: Barnes Reports

# Australia

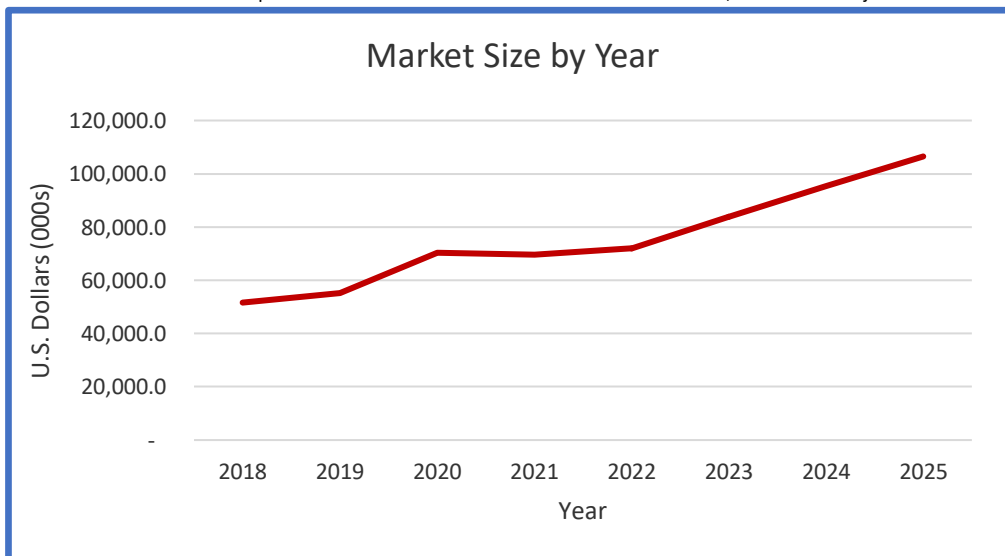
**Equipment Type: Continuous mining machines, borer, ripper, auger, and drum, including roadheading machines**

The market for this equipment in Australia is estimated to be \$95.3 million dollars in 2024 and is expected to change by 11.8 percent from 2024 to 2025. The market will be 142.2 million Dollars in 2024 and is forecast to change by 15.2 percent from 2024 to 2025.

Market Sales (000s)		
Year	US Dollars	Dollars
2018	51,619.6	66,594.4
2019	55,175.3	77,146.1
2020	70,269.4	104,827.9
2021	69,689.6	93,374.9
2022	71,928.5	104,360.0
2023	83,852.3	123,451.4
2024	95,286.4	142,210.8
2025	106,498.8	160,736.7
2030	149,400.9	232,579.2
Y-to-Y Change	US Dollars	Dollars
2018-2019	6.9%	15.8%
2019-2020	27.4%	35.9%
2020-2021	-0.8%	-10.9%
2021-2022	3.2%	11.8%
2022-2023	16.6%	18.3%
2023-2024	13.6%	15.2%
2024-2025	11.8%	13.0%
CAGR 2025-2030	8.1%	44.7%

Source: Barnes Reports

\*2023-2024 Forecasts; 2025-2030 Projections



# Australia

**Equipment Type: Continuous mining machines, borer, ripper, auger, and drum, including roadheading machines**

## Costs and Value Added Estimates

The total cost of materials for this market in Australia will be \$42.07 million dollars in 2024 and the value added amount for the market will be \$46.91 million dollars. The cost of resales for this equipment is expected to reach \$3.69 million dollars in 2024.

<b>2024 Costs and Value Added</b>	<b>US Dollars (000s)</b>
Total cost of materials (\$1,000)	42,065.62
Cost of resales (\$1,000)	3,694.43
Cost of purchased fuels consumed (\$1,000)	132.77
Cost of purchased electricity (\$1,000)	532.61
Cost of contract work (\$1,000)	1,395.43
Value of resales (\$1,000)	5,326.71
Value added (\$1,000)	46,914.59

## Capital Expenses Estimates

The total capital expenses for this market in Australia will be \$2.26 million dollars in 2024 and the expenditures for machinery and equipment for the market will be \$1.88 million dollars. The expenditures for buildings for this equipment expected to reach \$0.38 million dollars in 2024.

<b>2024 Capital Expenses</b>	<b>US Dollars (000s)</b>
Total capital expenditures (\$1,000)	2,262.19
Capital expenditures for buildings and other structures (\$1,000)	382.05
Capital expenditures for machinery and equipment (\$1,000)	1,880.13
Capital expenditures for automobiles, trucks, etc. (\$1,000)	81.12
Capital expenditures for computers and peripheral equip. (\$1,000)	108.44
Capital expenditures for all other machinery and equip. (\$1,000)	1,690.57

\*2023-2024 Forecasts

Source: Barnes Reports

# Austria

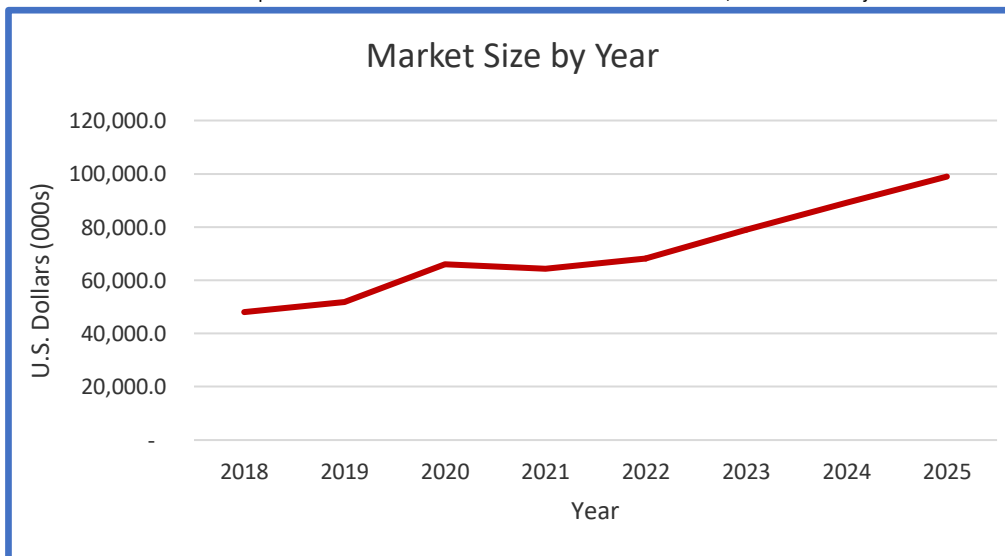
**Equipment Type: Continuous mining machines, borer, ripper, auger, and drum, including roadheading machines**

The market for this equipment in Austria is estimated to be \$89.1 million dollars in 2024 and is expected to change by 11 percent from 2024 to 2025. The market will be 73.5 million Euros in 2024 and is forecast to change by 11.2 percent from 2024 to 2025.

Market Sales (000s)		
Year	US Dollars	Euros
2018	48,061.0	40,696.7
2019	51,765.6	46,241.0
2020	65,988.1	57,773.0
2021	64,289.7	54,356.5
2022	68,192.7	57,992.3
2023	78,959.2	66,086.5
2024	89,119.6	73,491.5
2025	98,938.5	80,530.3
2030	139,905.7	107,658.4
Y-to-Y Change	US Dollars	Euros
2018-2019	7.7%	13.6%
2019-2020	27.5%	24.9%
2020-2021	-2.6%	-5.9%
2021-2022	6.1%	6.7%
2022-2023	15.8%	14.0%
2023-2024	12.9%	11.2%
2024-2025	11.0%	9.6%
CAGR 2025-2030	8.3%	33.7%

Source: Barnes Reports

\*2023-2024 Forecasts; 2025-2030 Projections



# Austria

**Equipment Type: Continuous mining machines, borer, ripper, auger, and drum, including roadheading machines**

## Costs and Value Added Estimates

The total cost of materials for this market in Austria will be \$39.34 million dollars in 2024 and the value added amount for the market will be \$43.88 million dollars. The cost of resales for this equipment is expected to reach \$3.46 million dollars in 2024.

<b>2024 Costs and Value Added</b>	<b>US Dollars (000s)</b>
Total cost of materials (\$1,000)	39,343.20
Cost of resales (\$1,000)	3,455.33
Cost of purchased fuels consumed (\$1,000)	124.18
Cost of purchased electricity (\$1,000)	498.14
Cost of contract work (\$1,000)	1,305.12
Value of resales (\$1,000)	4,981.97
Value added (\$1,000)	43,878.36

## Capital Expenses Estimates

The total capital expenses for this market in Austria will be \$2.12 million dollars in 2024 and the expenditures for machinery and equipment for the market will be \$1.76 million dollars. The expenditures for buildings for this equipment expected to reach \$0.36 million dollars in 2024.

<b>2024 Capital Expenses</b>	<b>US Dollars (000s)</b>
Total capital expenditures (\$1,000)	2,115.78
Capital expenditures for buildings and other structures (\$1,000)	357.33
Capital expenditures for machinery and equipment (\$1,000)	1,758.45
Capital expenditures for automobiles, trucks, etc. (\$1,000)	75.87
Capital expenditures for computers and peripheral equip. (\$1,000)	101.42
Capital expenditures for all other machinery and equip. (\$1,000)	1,581.16

\*2023-2024 Forecasts

Source: Barnes Reports



# Bangladesh

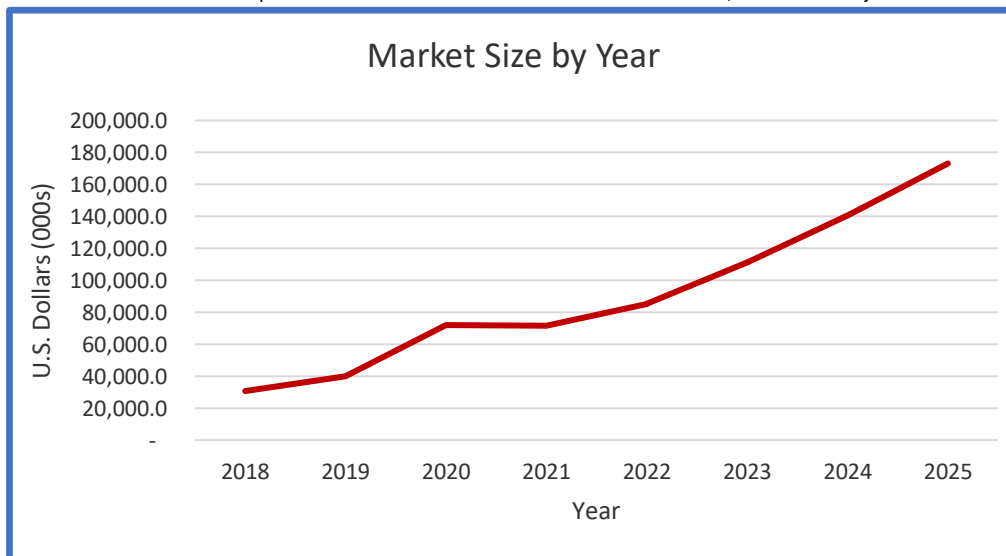
**Equipment Type: Continuous mining machines, borer, ripper, auger, and drum, including roadheading machines**

The market for this equipment in Bangladesh is estimated to be \$140.4 million dollars in 2024 and is expected to change by 23.3 percent from 2024 to 2025. The market will be 12208.1 million Takas in 2024 and is forecast to change by 26.5 percent from 2024 to 2025.

Market Sales (000s)		
Year	US Dollars	Takas
2018	30,672.2	2,518,881.5
2019	40,095.2	3,369,259.0
2020	72,123.6	6,115,659.0
2021	71,501.2	6,063,748.2
2022	85,305.9	7,394,398.3
2023	111,177.8	9,653,929.7
2024	140,364.3	12,208,063.3
2025	173,096.0	15,068,830.6
2030	363,224.7	32,167,467.5
Y-to-Y Change	US Dollars	Takas
2018-2019	30.7%	33.8%
2019-2020	79.9%	81.5%
2020-2021	-0.9%	-0.8%
2021-2022	19.3%	21.9%
2022-2023	30.3%	30.6%
2023-2024	26.3%	26.5%
2024-2025	23.3%	23.4%
CAGR 2025-2030	22.0%	113.5%

Source: Barnes Reports

\*2023-2024 Forecasts; 2025-2030 Projections



# Bangladesh

**Equipment Type: Continuous mining machines, borer, ripper, auger, and drum, including roadheading machines**

## Costs and Value Added Estimates

The total cost of materials for this market in Bangladesh will be \$61.97 million dollars in 2024 and the value added amount for the market will be \$69.11 million dollars. The cost of resales for this equipment is expected to reach \$5.44 million dollars in 2024.

<b>2024 Costs and Value Added</b>	<b>US Dollars (000s)</b>
Total cost of materials (\$1,000)	61,965.98
Cost of resales (\$1,000)	5,442.19
Cost of purchased fuels consumed (\$1,000)	195.58
Cost of purchased electricity (\$1,000)	784.58
Cost of contract work (\$1,000)	2,055.57
Value of resales (\$1,000)	7,846.66
Value added (\$1,000)	69,108.90

## Capital Expenses Estimates

The total capital expenses for this market in Bangladesh will be \$3.33 million dollars in 2024 and the expenditures for machinery and equipment for the market will be \$2.77 million dollars. The expenditures for buildings for this equipment expected to reach \$0.56 million dollars in 2024.

<b>2024 Capital Expenses</b>	<b>US Dollars (000s)</b>
Total capital expenditures (\$1,000)	3,332.38
Capital expenditures for buildings and other structures (\$1,000)	562.80
Capital expenditures for machinery and equipment (\$1,000)	2,769.58
Capital expenditures for automobiles, trucks, etc. (\$1,000)	119.50
Capital expenditures for computers and peripheral equip. (\$1,000)	159.74
Capital expenditures for all other machinery and equip. (\$1,000)	2,490.34

\*2023-2024 Forecasts

Source: Barnes Reports

# Belgium

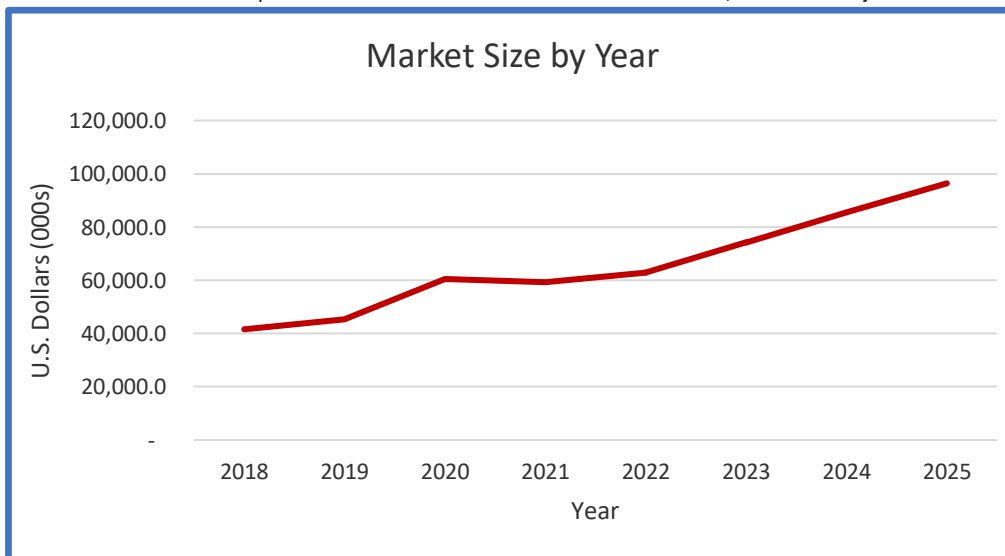
**Equipment Type: Continuous mining machines, borer, ripper, auger, and drum, including roadheading machines**

The market for this equipment in Belgium is estimated to be \$85.4 million dollars in 2024 and is expected to change by 12.9 percent from 2024 to 2025. The market will be 69.7 million Euros in 2024 and is forecast to change by 12.8 percent from 2024 to 2025.

Market Sales (000s)		
Year	US Dollars	Euros
2018	41,583.5	35,211.7
2019	45,390.2	40,546.0
2020	60,498.5	52,966.8
2021	59,203.8	50,056.5
2022	62,911.9	53,444.2
2023	74,270.5	61,809.7
2024	85,395.3	69,719.3
2025	96,405.8	77,400.0
2030	145,964.1	110,229.6
Y-to-Y Change	US Dollars	Euros
2018-2019	9.2%	15.1%
2019-2020	33.3%	30.6%
2020-2021	-2.1%	-5.5%
2021-2022	6.3%	6.8%
2022-2023	18.1%	15.7%
2023-2024	15.0%	12.8%
2024-2025	12.9%	11.0%
CAGR 2025-2030	10.3%	42.4%

Source: Barnes Reports

\*2023-2024 Forecasts; 2025-2030 Projections



# Belgium

**Equipment Type: Continuous mining machines, borer, ripper, auger, and drum, including roadheading machines**

## Costs and Value Added Estimates

The total cost of materials for this market in Belgium will be \$37.70 million dollars in 2024 and the value added amount for the market will be \$42.04 million dollars. The cost of resales for this equipment is expected to reach \$3.31 million dollars in 2024.

<b>2024 Costs and Value Added</b>	<b>US Dollars (000s)</b>
Total cost of materials (\$1,000)	37,699.05
Cost of resales (\$1,000)	3,310.93
Cost of purchased fuels consumed (\$1,000)	118.99
Cost of purchased electricity (\$1,000)	477.32
Cost of contract work (\$1,000)	1,250.58
Value of resales (\$1,000)	4,773.77
Value added (\$1,000)	42,044.68

## Capital Expenses Estimates

The total capital expenses for this market in Belgium will be \$2.03 million dollars in 2024 and the expenditures for machinery and equipment for the market will be \$1.68 million dollars. The expenditures for buildings for this equipment expected to reach \$0.34 million dollars in 2024.

<b>2024 Capital Expenses</b>	<b>US Dollars (000s)</b>
Total capital expenditures (\$1,000)	2,027.36
Capital expenditures for buildings and other structures (\$1,000)	342.40
Capital expenditures for machinery and equipment (\$1,000)	1,684.97
Capital expenditures for automobiles, trucks, etc. (\$1,000)	72.70
Capital expenditures for computers and peripheral equip. (\$1,000)	97.18
Capital expenditures for all other machinery and equip. (\$1,000)	1,515.08

\*2023-2024 Forecasts

Source: Barnes Reports

# Brazil

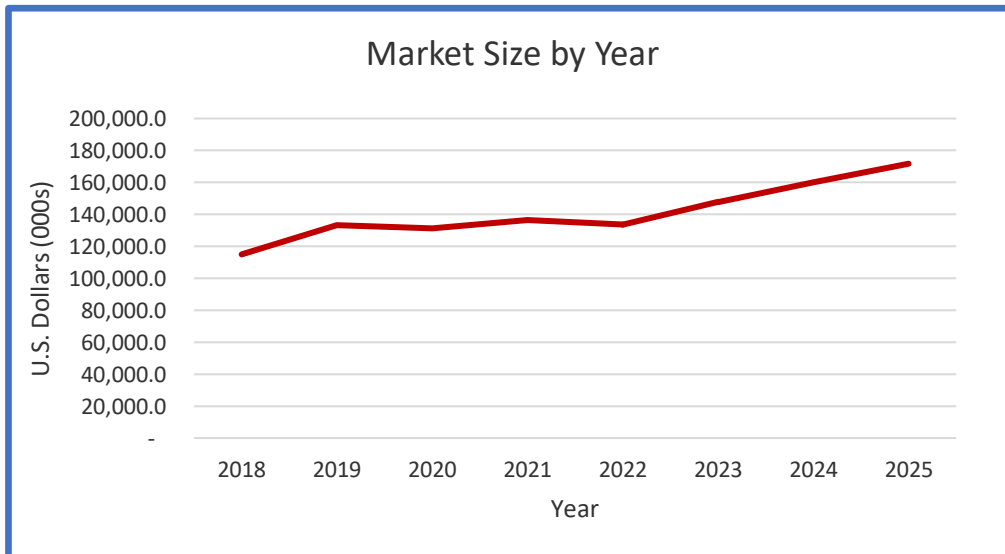
**Equipment Type: Continuous mining machines, borer, ripper, auger, and drum, including roadheading machines**

The market for this equipment in Brazil is estimated to be \$160.1 million dollars in 2024 and is expected to change by 7.3 percent from 2024 to 2025. The market will be 1160.4 million Reals in 2024 and is forecast to change by 19 percent from 2024 to 2025.

Market Sales (000s)		
Year	US Dollars	Reals
2018	114,958.7	420,036.0
2019	133,290.2	525,763.1
2020	131,086.1	675,772.4
2021	136,408.7	735,843.1
2022	133,561.2	796,096.8
2023	147,829.8	975,097.1
2024	160,069.3	1,160,392.9
2025	171,711.1	1,348,575.9
2030	209,788.2	2,245,236.7
Y-to-Y Change	US Dollars	Reals
2018-2019	15.9%	25.2%
2019-2020	-1.7%	28.5%
2020-2021	4.1%	8.9%
2021-2022	-2.1%	8.2%
2022-2023	10.7%	22.5%
2023-2024	8.3%	19.0%
2024-2025	7.3%	16.2%
CAGR 2025-2030	4.4%	66.5%

Source: Barnes Reports

\*2023-2024 Forecasts; 2025-2030 Projections



# Brazil

**Equipment Type: Continuous mining machines, borer, ripper, auger, and drum, including roadheading machines**

## Costs and Value Added Estimates

The total cost of materials for this market in Brazil will be \$70.67 million dollars in 2024 and the value added amount for the market will be \$78.81 million dollars. The cost of resales for this equipment is expected to reach \$6.21 million dollars in 2024.

<b>2024 Costs and Value Added</b>	<b>US Dollars (000s)</b>
Total cost of materials (\$1,000)	70,665.06
Cost of resales (\$1,000)	6,206.19
Cost of purchased fuels consumed (\$1,000)	223.04
Cost of purchased electricity (\$1,000)	894.72
Cost of contract work (\$1,000)	2,344.15
Value of resales (\$1,000)	8,948.21
Value added (\$1,000)	78,810.73

## Capital Expenses Estimates

The total capital expenses for this market in Brazil will be \$3.80 million dollars in 2024 and the expenditures for machinery and equipment for the market will be \$3.16 million dollars. The expenditures for buildings for this equipment expected to reach \$0.64 million dollars in 2024.

<b>2024 Capital Expenses</b>	<b>US Dollars (000s)</b>
Total capital expenditures (\$1,000)	3,800.19
Capital expenditures for buildings and other structures (\$1,000)	641.80
Capital expenditures for machinery and equipment (\$1,000)	3,158.39
Capital expenditures for automobiles, trucks, etc. (\$1,000)	136.27
Capital expenditures for computers and peripheral equip. (\$1,000)	182.17
Capital expenditures for all other machinery and equip. (\$1,000)	2,839.95

\*2023-2024 Forecasts

Source: Barnes Reports

# Canada

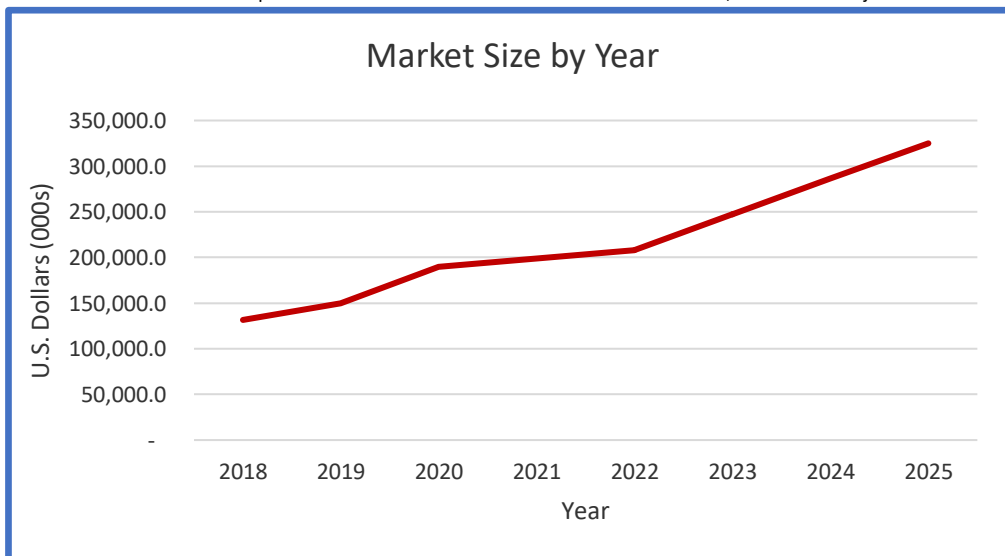
**Equipment Type: Continuous mining machines, borer, ripper, auger, and drum, including roadheading machines**

The market for this equipment in Canada is estimated to be \$286.3 million dollars in 2024 and is expected to change by 13.5 percent from 2024 to 2025. The market will be 355.5 million Dollars in 2024 and is forecast to change by 13.6 percent from 2024 to 2025.

Market Sales (000s)		
Year	US Dollars	Dollars
2018	131,563.6	170,474.2
2019	149,930.0	198,926.2
2020	189,516.1	254,170.0
2021	199,118.3	249,669.8
2022	208,116.0	268,649.5
2023	247,391.8	312,994.8
2024	286,285.4	355,475.6
2025	324,982.0	396,948.1
2030	507,003.8	581,987.8
Y-to-Y Change	US Dollars	Dollars
2018-2019	14.0%	16.7%
2019-2020	26.4%	27.8%
2020-2021	5.1%	-1.8%
2021-2022	4.5%	7.6%
2022-2023	18.9%	16.5%
2023-2024	15.7%	13.6%
2024-2025	13.5%	11.7%
CAGR 2025-2030	11.2%	46.6%

Source: Barnes Reports

\*2023-2024 Forecasts; 2025-2030 Projections



# Canada

**Equipment Type: Continuous mining machines, borer, ripper, auger, and drum, including roadheading machines**

## Costs and Value Added Estimates

The total cost of materials for this market in Canada will be \$126.39 million dollars in 2024 and the value added amount for the market will be \$140.95 million dollars. The cost of resales for this equipment is expected to reach \$11.10 million dollars in 2024.

<b>2024 Costs and Value Added</b>	<b>US Dollars (000s)</b>
Total cost of materials (\$1,000)	126,385.06
Cost of resales (\$1,000)	11,099.82
Cost of purchased fuels consumed (\$1,000)	398.91
Cost of purchased electricity (\$1,000)	1,600.21
Cost of contract work (\$1,000)	4,192.52
Value of resales (\$1,000)	16,003.95
Value added (\$1,000)	140,953.67

## Capital Expenses Estimates

The total capital expenses for this market in Canada will be \$6.80 million dollars in 2024 and the expenditures for machinery and equipment for the market will be \$5.65 million dollars. The expenditures for buildings for this equipment expected to reach \$1.15 million dollars in 2024.

<b>2024 Capital Expenses</b>	<b>US Dollars (000s)</b>
Total capital expenditures (\$1,000)	6,796.68
Capital expenditures for buildings and other structures (\$1,000)	1,147.87
Capital expenditures for machinery and equipment (\$1,000)	5,648.81
Capital expenditures for automobiles, trucks, etc. (\$1,000)	243.72
Capital expenditures for computers and peripheral equip. (\$1,000)	325.81
Capital expenditures for all other machinery and equip. (\$1,000)	5,079.28

\*2023-2024 Forecasts

Source: Barnes Reports



# Chile

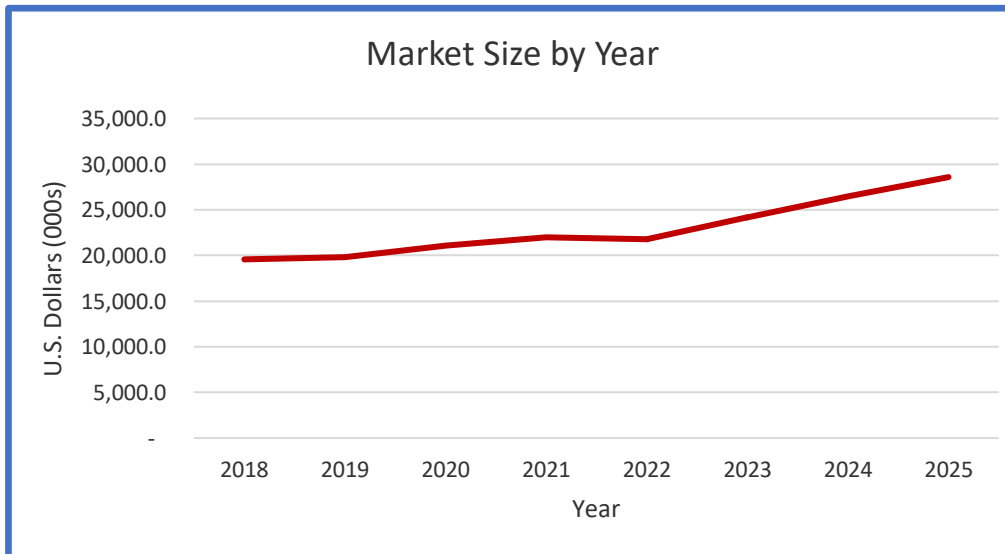
**Equipment Type: Continuous mining machines, borer, ripper, auger, and drum, including roadheading machines**

The market for this equipment in Chile is estimated to be \$26.5 million dollars in 2024 and is expected to change by 7.9 percent from 2024 to 2025. The market will be 23917.8 million Pesos in 2024 and is forecast to change by 15.4 percent from 2024 to 2025.

Market Sales (000s)		
Year	US Dollars	Pesos
2018	19,570.9	12,550,392.4
2019	19,828.7	13,937,560.0
2020	21,081.3	16,711,737.6
2021	21,971.4	16,675,330.0
2022	21,772.6	17,645,384.6
2023	24,178.4	20,719,922.6
2024	26,493.9	23,917,824.9
2025	28,583.2	26,966,622.9
2030	35,331.5	39,332,381.1
Y-to-Y Change	US Dollars	Pesos
2018-2019	1.3%	11.1%
2019-2020	6.3%	19.9%
2020-2021	4.2%	-0.2%
2021-2022	-0.9%	5.8%
2022-2023	11.0%	17.4%
2023-2024	9.6%	15.4%
2024-2025	7.9%	12.7%
CAGR 2025-2030	4.7%	45.9%

Source: Barnes Reports

\*2023-2024 Forecasts; 2025-2030 Projections



# Chile

**Equipment Type: Continuous mining machines, borer, ripper, auger, and drum, including roadheading machines**

## Costs and Value Added Estimates

The total cost of materials for this market in Chile will be \$11.70 million dollars in 2024 and the value added amount for the market will be \$13.04 million dollars. The cost of resales for this equipment is expected to reach \$1.03 million dollars in 2024.

<b>2024 Costs and Value Added</b>	<b>US Dollars (000s)</b>
Total cost of materials (\$1,000)	11,696.12
Cost of resales (\$1,000)	1,027.22
Cost of purchased fuels consumed (\$1,000)	36.92
Cost of purchased electricity (\$1,000)	148.09
Cost of contract work (\$1,000)	387.99
Value of resales (\$1,000)	1,481.06
Value added (\$1,000)	13,044.35

## Capital Expenses Estimates

The total capital expenses for this market in Chile will be \$0.63 million dollars in 2024 and the expenditures for machinery and equipment for the market will be \$0.52 million dollars. The expenditures for buildings for this equipment expected to reach \$0.11 million dollars in 2024.

<b>2024 Capital Expenses</b>	<b>US Dollars (000s)</b>
Total capital expenditures (\$1,000)	628.99
Capital expenditures for buildings and other structures (\$1,000)	106.23
Capital expenditures for machinery and equipment (\$1,000)	522.76
Capital expenditures for automobiles, trucks, etc. (\$1,000)	22.56
Capital expenditures for computers and peripheral equip. (\$1,000)	30.15
Capital expenditures for all other machinery and equip. (\$1,000)	470.05

\*2023-2024 Forecasts

Source: Barnes Reports

# China

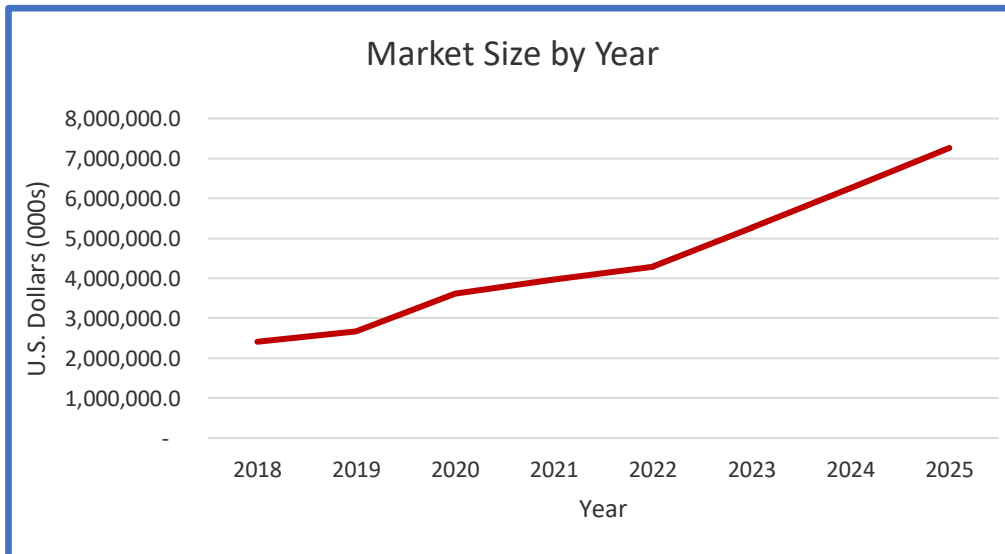
**Equipment Type: Continuous mining machines, borer, ripper, auger, and drum, including roadheading machines**

The market for this equipment in China is estimated to be \$6,262.5 million dollars in 2024 and is expected to change by 16 percent from 2024 to 2025. The market will be 40952.6 million Yuans in 2024 and is forecast to change by 17.8 percent from 2024 to 2025.

Market Sales (000s)		
Year	US Dollars	Yuans
2018	2,411,066.6	15,951,616.5
2019	2,676,188.3	18,488,179.0
2020	3,615,361.9	24,948,889.2
2021	3,970,743.5	25,607,226.2
2022	4,292,983.9	28,644,628.2
2023	5,263,620.1	34,757,983.1
2024	6,262,453.0	40,952,647.8
2025	7,262,641.7	47,075,376.2
2030	12,055,334.9	74,854,077.3
Y-to-Y Change	US Dollars	Yuans
2018-2019	11.0%	15.9%
2019-2020	35.1%	34.9%
2020-2021	9.8%	2.6%
2021-2022	8.1%	11.9%
2022-2023	22.6%	21.3%
2023-2024	19.0%	17.8%
2024-2025	16.0%	15.0%
CAGR 2025-2030	13.2%	59.0%

Source: Barnes Reports

\*2023-2024 Forecasts; 2025-2030 Projections



# China

**Equipment Type: Continuous mining machines, borer, ripper, auger, and drum, including roadheading machines**

## Costs and Value Added Estimates

The total cost of materials for this market in China will be \$2,764.66 million dollars in 2024 and the value added amount for the market will be \$3,083.34 million dollars. The cost of resales for this equipment is expected to reach \$242.81 million dollars in 2024.

<b>2024 Costs and Value Added</b>	<b>US Dollars (000s)</b>
Total cost of materials (\$1,000)	2,764,655.70
Cost of resales (\$1,000)	242,806.98
Cost of purchased fuels consumed (\$1,000)	8,726.11
Cost of purchased electricity (\$1,000)	35,004.40
Cost of contract work (\$1,000)	91,710.88
Value of resales (\$1,000)	350,084.20
Value added (\$1,000)	3,083,342.07

## Capital Expenses Estimates

The total capital expenses for this market in China will be \$148.68 million dollars in 2024 and the expenditures for machinery and equipment for the market will be \$123.57 million dollars. The expenditures for buildings for this equipment expected to reach \$25.11 million dollars in 2024.

<b>2024 Capital Expenses</b>	<b>US Dollars (000s)</b>
Total capital expenditures (\$1,000)	148,676.37
Capital expenditures for buildings and other structures (\$1,000)	25,109.50
Capital expenditures for machinery and equipment (\$1,000)	123,566.85
Capital expenditures for automobiles, trucks, etc. (\$1,000)	5,331.44
Capital expenditures for computers and peripheral equip. (\$1,000)	7,126.97
Capital expenditures for all other machinery and equip. (\$1,000)	111,108.46

\*2023-2024 Forecasts

Source: Barnes Reports

# Czech Republic

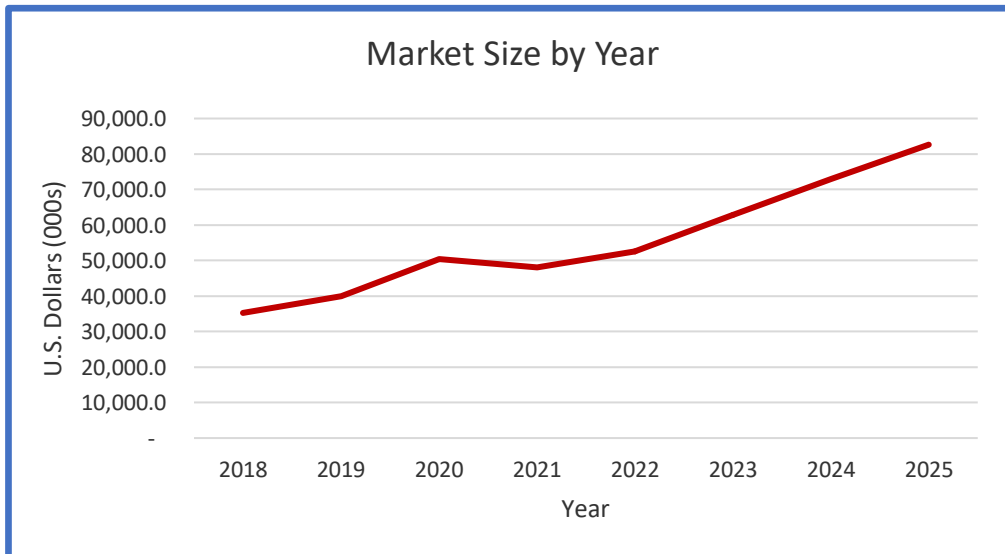
**Equipment Type: Continuous mining machines, borer, ripper, auger, and drum, including roadheading machines**

The market for this equipment in Czech Republic is estimated to be \$72.9 million dollars in 2024 and is expected to change by 13.3 percent from 2024 to 2025. The market will be 1534.3 million Korunas in 2024 and is forecast to change by 13.1 percent from 2024 to 2025.

Market Sales (000s)		
Year	US Dollars	Korunas
2018	35,243.7	765,842.4
2019	39,980.3	916,838.7
2020	50,332.1	1,168,221.2
2021	48,045.2	1,041,531.7
2022	52,577.3	1,166,482.9
2023	62,836.2	1,356,429.5
2024	72,920.0	1,534,326.3
2025	82,628.3	1,700,133.3
2030	124,589.9	2,418,130.5
Y-to-Y Change	US Dollars	Korunas
2018-2019	13.4%	19.7%
2019-2020	25.9%	27.4%
2020-2021	-4.5%	-10.8%
2021-2022	9.4%	12.0%
2022-2023	19.5%	16.3%
2023-2024	16.0%	13.1%
2024-2025	13.3%	10.8%
CAGR 2025-2030	10.2%	42.2%

Source: Barnes Reports

\*2023-2024 Forecasts; 2025-2030 Projections



# Czech Republic

**Equipment Type: Continuous mining machines, borer, ripper, auger, and drum, including roadheading machines**

## Costs and Value Added Estimates

The total cost of materials for this market in Czech Republic will be \$32.19 million dollars in 2024 and the value added amount for the market will be \$35.90 million dollars. The cost of resales for this equipment is expected to reach \$2.83 million dollars in 2024.

<b>2024 Costs and Value Added</b>	<b>US Dollars (000s)</b>
Total cost of materials (\$1,000)	32,191.66
Cost of resales (\$1,000)	2,827.25
Cost of purchased fuels consumed (\$1,000)	101.61
Cost of purchased electricity (\$1,000)	407.59
Cost of contract work (\$1,000)	1,067.88
Value of resales (\$1,000)	4,076.38
Value added (\$1,000)	35,902.44

## Capital Expenses Estimates

The total capital expenses for this market in Czech Republic will be \$1.73 million dollars in 2024 and the expenditures for machinery and equipment for the market will be \$1.44 million dollars. The expenditures for buildings for this equipment expected to reach \$0.29 million dollars in 2024.

<b>2024 Capital Expenses</b>	<b>US Dollars (000s)</b>
Total capital expenditures (\$1,000)	1,731.19
Capital expenditures for buildings and other structures (\$1,000)	292.38
Capital expenditures for machinery and equipment (\$1,000)	1,438.81
Capital expenditures for automobiles, trucks, etc. (\$1,000)	62.08
Capital expenditures for computers and peripheral equip. (\$1,000)	82.99
Capital expenditures for all other machinery and equip. (\$1,000)	1,293.75

\*2023-2024 Forecasts

Source: Barnes Reports

# Denmark

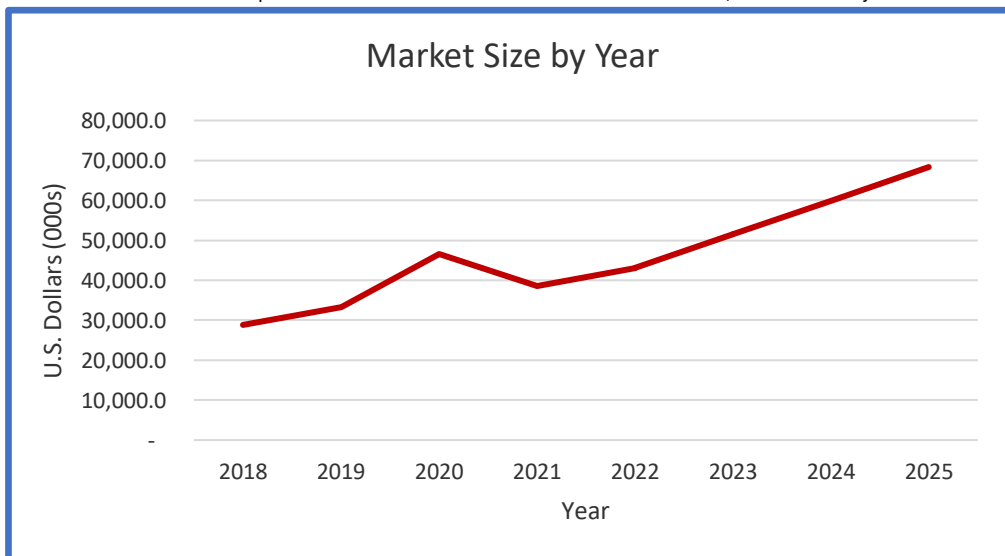
**Equipment Type: Continuous mining machines, borer, ripper, auger, and drum, including roadheading machines**

The market for this equipment in Denmark is estimated to be \$59.9 million dollars in 2024 and is expected to change by 14 percent from 2024 to 2025. The market will be 363.7 million Kroner in 2024 and is forecast to change by 13.6 percent from 2024 to 2025.

Market Sales (000s)		
Year	US Dollars	Kroner
2018	28,828.7	182,042.3
2019	33,349.8	222,424.6
2020	46,539.1	304,466.2
2021	38,519.6	242,177.1
2022	43,092.4	274,496.1
2023	51,516.1	320,023.7
2024	59,931.6	363,688.3
2025	68,341.3	406,337.8
2030	104,193.6	578,085.1
Y-to-Y Change	US Dollars	Kroner
2018-2019	15.7%	22.2%
2019-2020	39.5%	36.9%
2020-2021	-17.2%	-20.5%
2021-2022	11.9%	13.3%
2022-2023	19.5%	16.6%
2023-2024	16.3%	13.6%
2024-2025	14.0%	11.7%
CAGR 2025-2030	10.5%	42.3%

Source: Barnes Reports

\*2023-2024 Forecasts; 2025-2030 Projections



# Denmark

**Equipment Type: Continuous mining machines, borer, ripper, auger, and drum, including roadheading machines**

## Costs and Value Added Estimates

The total cost of materials for this market in Denmark will be \$26.46 million dollars in 2024 and the value added amount for the market will be \$29.51 million dollars. The cost of resales for this equipment is expected to reach \$2.32 million dollars in 2024.

<b>2024 Costs and Value Added</b>	<b>US Dollars (000s)</b>
Total cost of materials (\$1,000)	26,457.73
Cost of resales (\$1,000)	2,323.66
Cost of purchased fuels consumed (\$1,000)	83.51
Cost of purchased electricity (\$1,000)	334.99
Cost of contract work (\$1,000)	877.67
Value of resales (\$1,000)	3,350.30
Value added (\$1,000)	29,507.56

## Capital Expenses Estimates

The total capital expenses for this market in Denmark will be \$1.42 million dollars in 2024 and the expenditures for machinery and equipment for the market will be \$1.18 million dollars. The expenditures for buildings for this equipment expected to reach \$0.24 million dollars in 2024.

<b>2024 Capital Expenses</b>	<b>US Dollars (000s)</b>
Total capital expenditures (\$1,000)	1,422.83
Capital expenditures for buildings and other structures (\$1,000)	240.30
Capital expenditures for machinery and equipment (\$1,000)	1,182.53
Capital expenditures for automobiles, trucks, etc. (\$1,000)	51.02
Capital expenditures for computers and peripheral equip. (\$1,000)	68.21
Capital expenditures for all other machinery and equip. (\$1,000)	1,063.31

\*2023-2024 Forecasts

Source: Barnes Reports



# Egypt

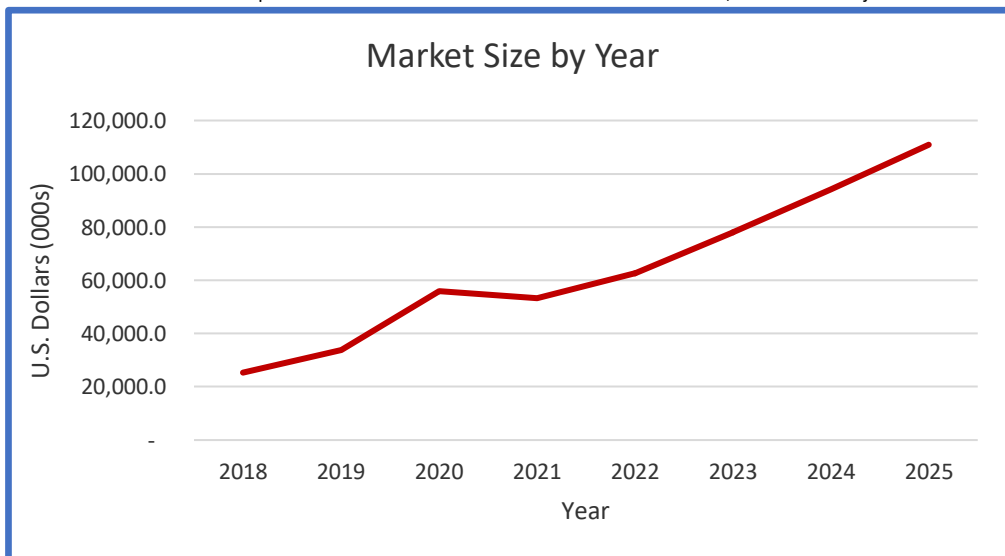
**Equipment Type: Continuous mining machines, borer, ripper, auger, and drum, including roadheading machines**

The market for this equipment in Egypt is estimated to be \$94.2 million dollars in 2024 and is expected to change by 17.7 percent from 2024 to 2025. The market will be 1522.5 million Pounds in 2024 and is forecast to change by 21 percent from 2024 to 2025.

Market Sales (000s)		
Year	US Dollars	Pounds
2018	25,322.3	447,858.0
2019	33,757.3	592,778.3
2020	56,018.4	897,975.7
2021	53,192.5	834,590.0
2022	62,591.4	1,007,935.1
2023	77,970.2	1,257,797.9
2024	94,223.9	1,522,472.5
2025	110,908.1	1,793,724.5
2030	192,011.2	3,149,711.9
Y-to-Y Change	US Dollars	Pounds
2018-2019	33.3%	32.4%
2019-2020	65.9%	51.5%
2020-2021	-5.0%	-7.1%
2021-2022	17.7%	20.8%
2022-2023	24.6%	24.8%
2023-2024	20.8%	21.0%
2024-2025	17.7%	17.8%
CAGR 2025-2030	14.6%	75.6%

Source: Barnes Reports

\*2023-2024 Forecasts; 2025-2030 Projections



# Egypt

**Equipment Type: Continuous mining machines, borer, ripper, auger, and drum, including roadheading machines**

## Costs and Value Added Estimates

The total cost of materials for this market in Egypt will be \$41.60 million dollars in 2024 and the value added amount for the market will be \$46.39 million dollars. The cost of resales for this equipment is expected to reach \$3.65 million dollars in 2024.

<b>2024 Costs and Value Added</b>	<b>US Dollars (000s)</b>
Total cost of materials (\$1,000)	41,596.58
Cost of resales (\$1,000)	3,653.24
Cost of purchased fuels consumed (\$1,000)	131.29
Cost of purchased electricity (\$1,000)	526.67
Cost of contract work (\$1,000)	1,379.87
Value of resales (\$1,000)	5,267.31
Value added (\$1,000)	46,391.49

## Capital Expenses Estimates

The total capital expenses for this market in Egypt will be \$2.24 million dollars in 2024 and the expenditures for machinery and equipment for the market will be \$1.86 million dollars. The expenditures for buildings for this equipment expected to reach \$0.38 million dollars in 2024.

<b>2024 Capital Expenses</b>	<b>US Dollars (000s)</b>
Total capital expenditures (\$1,000)	2,236.96
Capital expenditures for buildings and other structures (\$1,000)	377.79
Capital expenditures for machinery and equipment (\$1,000)	1,859.17
Capital expenditures for automobiles, trucks, etc. (\$1,000)	80.22
Capital expenditures for computers and peripheral equip. (\$1,000)	107.23
Capital expenditures for all other machinery and equip. (\$1,000)	1,671.72

\*2023-2024 Forecasts

Source: Barnes Reports

# Finland

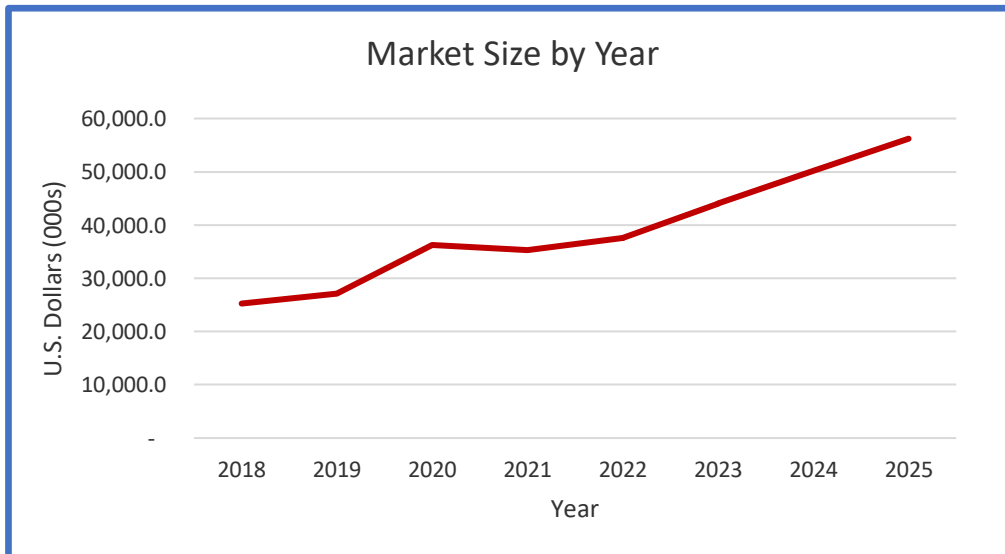
**Equipment Type: Continuous mining machines, borer, ripper, auger, and drum, including roadheading machines**

The market for this equipment in Finland is estimated to be \$50.2 million dollars in 2024 and is expected to change by 12 percent from 2024 to 2025. The market will be 41.2 million Euros in 2024 and is forecast to change by 11.9 percent from 2024 to 2025.

Market Sales (000s)		
Year	US Dollars	Euros
2018	25,253.0	21,383.5
2019	27,132.0	24,236.4
2020	36,295.3	31,776.8
2021	35,274.7	29,824.6
2022	37,576.5	32,071.4
2023	44,002.2	36,810.5
2024	50,185.6	41,206.4
2025	56,206.4	45,401.5
2030	81,148.2	61,926.7
Y-to-Y Change	US Dollars	Euros
2018-2019	7.4%	13.3%
2019-2020	33.8%	31.1%
2020-2021	-2.8%	-6.1%
2021-2022	6.5%	7.5%
2022-2023	17.1%	14.8%
2023-2024	14.1%	11.9%
2024-2025	12.0%	10.2%
CAGR 2025-2030	8.9%	36.4%

Source: Barnes Reports

\*2023-2024 Forecasts; 2025-2030 Projections



# Finland

**Equipment Type: Continuous mining machines, borer, ripper, auger, and drum, including roadheading machines**

## Costs and Value Added Estimates

The total cost of materials for this market in Finland will be \$22.16 million dollars in 2024 and the value added amount for the market will be \$24.71 million dollars. The cost of resales for this equipment is expected to reach \$1.95 million dollars in 2024.

<b>2024 Costs and Value Added</b>	<b>US Dollars (000s)</b>
Total cost of materials (\$1,000)	22,155.19
Cost of resales (\$1,000)	1,945.79
Cost of purchased fuels consumed (\$1,000)	69.93
Cost of purchased electricity (\$1,000)	280.52
Cost of contract work (\$1,000)	734.95
Value of resales (\$1,000)	2,805.48
Value added (\$1,000)	24,709.06

## Capital Expenses Estimates

The total capital expenses for this market in Finland will be \$1.19 million dollars in 2024 and the expenditures for machinery and equipment for the market will be \$0.99 million dollars. The expenditures for buildings for this equipment expected to reach \$0.20 million dollars in 2024.

<b>2024 Capital Expenses</b>	<b>US Dollars (000s)</b>
Total capital expenditures (\$1,000)	1,191.45
Capital expenditures for buildings and other structures (\$1,000)	201.22
Capital expenditures for machinery and equipment (\$1,000)	990.23
Capital expenditures for automobiles, trucks, etc. (\$1,000)	42.72
Capital expenditures for computers and peripheral equip. (\$1,000)	57.11
Capital expenditures for all other machinery and equip. (\$1,000)	890.39

\*2023-2024 Forecasts

Source: Barnes Reports

# France

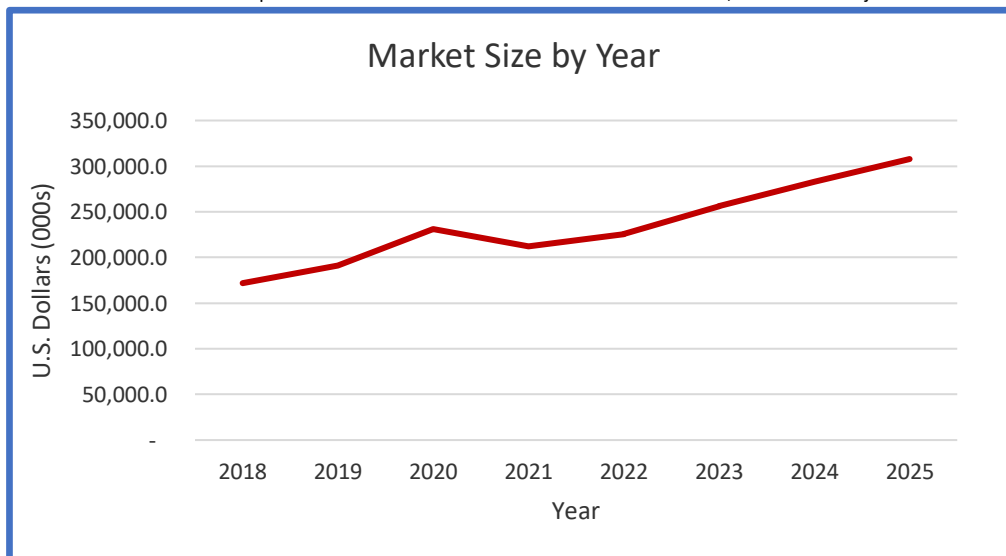
**Equipment Type: Continuous mining machines, borer, ripper, auger, and drum, including roadheading machines**

The market for this equipment in France is estimated to be \$283.0 million dollars in 2024 and is expected to change by 8.7 percent from 2024 to 2025. The market will be 234.1 million Euros in 2024 and is forecast to change by 9.2 percent from 2024 to 2025.

Market Sales (000s)		
Year	US Dollars	Euros
2018	171,868.7	145,533.8
2019	191,155.8	170,755.0
2020	231,328.2	202,529.3
2021	212,443.4	179,619.7
2022	225,707.3	191,542.5
2023	256,031.6	214,384.5
2024	283,040.8	234,062.7
2025	307,776.9	251,726.1
2030	404,205.9	314,755.1
Y-to-Y Change	US Dollars	Euros
2018-2019	11.2%	17.3%
2019-2020	21.0%	18.6%
2020-2021	-8.2%	-11.3%
2021-2022	6.2%	6.6%
2022-2023	13.4%	11.9%
2023-2024	10.5%	9.2%
2024-2025	8.7%	7.5%
CAGR 2025-2030	6.3%	25.0%

Source: Barnes Reports

\*2023-2024 Forecasts; 2025-2030 Projections



# France

**Equipment Type: Continuous mining machines, borer, ripper, auger, and drum, including roadheading machines**

## Costs and Value Added Estimates

The total cost of materials for this market in France will be \$124.95 million dollars in 2024 and the value added amount for the market will be \$139.36 million dollars. The cost of resales for this equipment is expected to reach \$10.97 million dollars in 2024.

<b>2024 Costs and Value Added</b>	<b>US Dollars (000s)</b>
Total cost of materials (\$1,000)	124,952.68
Cost of resales (\$1,000)	10,974.02
Cost of purchased fuels consumed (\$1,000)	394.39
Cost of purchased electricity (\$1,000)	1,582.08
Cost of contract work (\$1,000)	4,145.01
Value of resales (\$1,000)	15,822.57
Value added (\$1,000)	139,356.18

## Capital Expenses Estimates

The total capital expenses for this market in France will be \$6.72 million dollars in 2024 and the expenditures for machinery and equipment for the market will be \$5.58 million dollars. The expenditures for buildings for this equipment expected to reach \$1.13 million dollars in 2024.

<b>2024 Capital Expenses</b>	<b>US Dollars (000s)</b>
Total capital expenditures (\$1,000)	6,719.65
Capital expenditures for buildings and other structures (\$1,000)	1,134.86
Capital expenditures for machinery and equipment (\$1,000)	5,584.79
Capital expenditures for automobiles, trucks, etc. (\$1,000)	240.96
Capital expenditures for computers and peripheral equip. (\$1,000)	322.11
Capital expenditures for all other machinery and equip. (\$1,000)	5,021.71

\*2023-2024 Forecasts

Source: Barnes Reports

# Germany

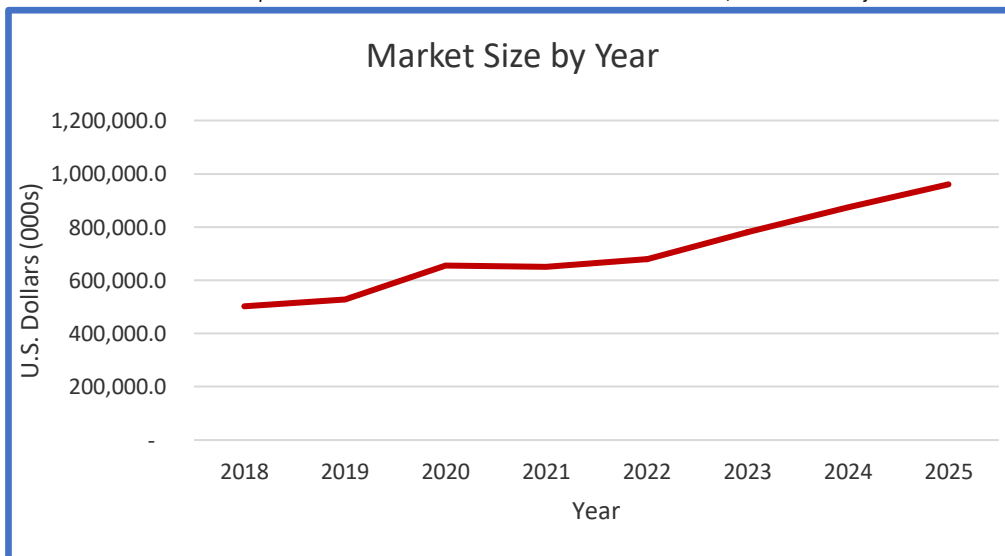
**Equipment Type: Continuous mining machines, borer, ripper, auger, and drum, including roadheading machines**

The market for this equipment in Germany is estimated to be \$873.5 million dollars in 2024 and is expected to change by 9.9 percent from 2024 to 2025. The market will be 715.1 million Euros in 2024 and is forecast to change by 9.9 percent from 2024 to 2025.

Market Sales (000s)		
Year	US Dollars	Euros
2018	502,257.3	425,297.8
2019	527,898.0	471,558.7
2020	654,485.9	573,006.6
2021	649,693.5	549,312.0
2022	678,726.0	576,912.5
2023	780,311.0	650,489.6
2024	873,546.3	715,141.1
2025	960,261.2	773,760.3
2030	1,295,602.7	980,109.1
Y-to-Y Change	US Dollars	Euros
2018-2019	5.1%	10.9%
2019-2020	24.0%	21.5%
2020-2021	-0.7%	-4.1%
2021-2022	4.5%	5.0%
2022-2023	15.0%	12.8%
2023-2024	11.9%	9.9%
2024-2025	9.9%	8.2%
CAGR 2025-2030	7.0%	26.7%

Source: Barnes Reports

\*2023-2024 Forecasts; 2025-2030 Projections



# Germany

**Equipment Type: Continuous mining machines, borer, ripper, auger, and drum, including roadheading machines**

## Costs and Value Added Estimates

The total cost of materials for this market in Germany will be \$385.64 million dollars in 2024 and the value added amount for the market will be \$430.09 million dollars. The cost of resales for this equipment is expected to reach \$33.87 million dollars in 2024.

<b>2024 Costs and Value Added</b>	<b>US Dollars (000s)</b>
Total cost of materials (\$1,000)	385,640.38
Cost of resales (\$1,000)	33,869.02
Cost of purchased fuels consumed (\$1,000)	1,217.20
Cost of purchased electricity (\$1,000)	4,882.75
Cost of contract work (\$1,000)	12,792.70
Value of resales (\$1,000)	48,833.06
Value added (\$1,000)	430,093.77

## Capital Expenses Estimates

The total capital expenses for this market in Germany will be \$20.74 million dollars in 2024 and the expenditures for machinery and equipment for the market will be \$17.24 million dollars. The expenditures for buildings for this equipment expected to reach \$3.50 million dollars in 2024.

<b>2024 Capital Expenses</b>	<b>US Dollars (000s)</b>
Total capital expenditures (\$1,000)	20,738.79
Capital expenditures for buildings and other structures (\$1,000)	3,502.51
Capital expenditures for machinery and equipment (\$1,000)	17,236.28
Capital expenditures for automobiles, trucks, etc. (\$1,000)	743.68
Capital expenditures for computers and peripheral equip. (\$1,000)	994.14
Capital expenditures for all other machinery and equip. (\$1,000)	15,498.46

\*2023-2024 Forecasts

Source: Barnes Reports



# Hungary

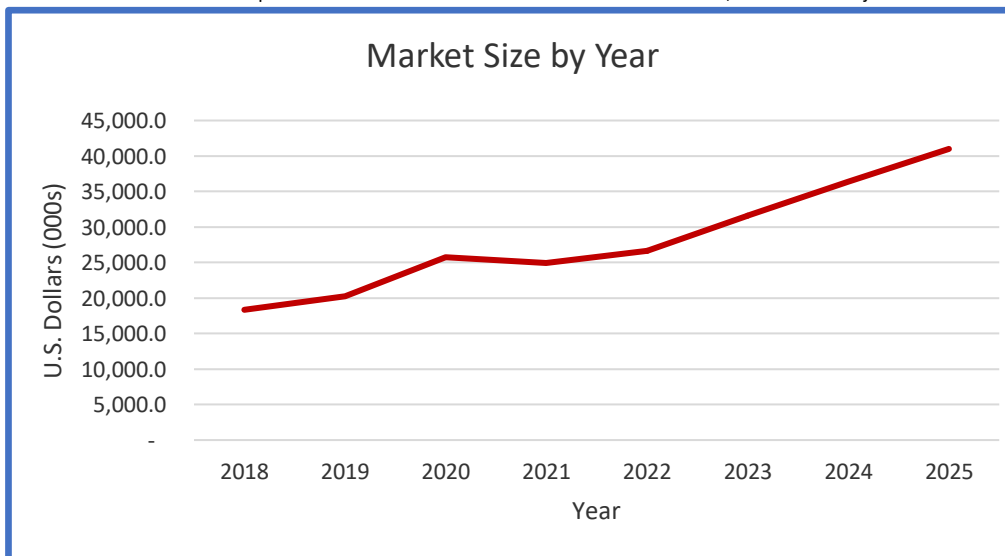
**Equipment Type: Continuous mining machines, borer, ripper, auger, and drum, including roadheading machines**

The market for this equipment in Hungary is estimated to be \$36.4 million dollars in 2024 and is expected to change by 12.6 percent from 2024 to 2025. The market will be 11921.9 million Forints in 2024 and is forecast to change by 16.7 percent from 2024 to 2025.

Market Sales (000s)		
Year	US Dollars	Forints
2018	18,343.1	4,956,517.0
2019	20,233.8	5,881,158.0
2020	25,734.4	7,926,104.9
2021	24,903.5	7,549,281.4
2022	26,635.7	8,491,627.7
2023	31,593.3	10,213,011.5
2024	36,404.4	11,921,922.0
2025	40,999.3	13,570,851.5
2030	60,500.7	21,132,227.7
Y-to-Y Change	US Dollars	Forints
2018-2019	10.3%	18.7%
2019-2020	27.2%	34.8%
2020-2021	-3.2%	-4.8%
2021-2022	7.0%	12.5%
2022-2023	18.6%	20.3%
2023-2024	15.2%	16.7%
2024-2025	12.6%	13.8%
CAGR 2025-2030	9.5%	55.7%

Source: Barnes Reports

\*2023-2024 Forecasts; 2025-2030 Projections



# Hungary

**Equipment Type: Continuous mining machines, borer, ripper, auger, and drum, including roadheading machines**

## Costs and Value Added Estimates

The total cost of materials for this market in Hungary will be \$16.07 million dollars in 2024 and the value added amount for the market will be \$17.92 million dollars. The cost of resales for this equipment is expected to reach \$1.41 million dollars in 2024.

<b>2024 Costs and Value Added</b>	<b>US Dollars (000s)</b>
Total cost of materials (\$1,000)	16,071.29
Cost of resales (\$1,000)	1,411.47
Cost of purchased fuels consumed (\$1,000)	50.73
Cost of purchased electricity (\$1,000)	203.49
Cost of contract work (\$1,000)	533.13
Value of resales (\$1,000)	2,035.08
Value added (\$1,000)	17,923.86

## Capital Expenses Estimates

The total capital expenses for this market in Hungary will be \$0.86 million dollars in 2024 and the expenditures for machinery and equipment for the market will be \$0.72 million dollars. The expenditures for buildings for this equipment expected to reach \$0.15 million dollars in 2024.

<b>2024 Capital Expenses</b>	<b>US Dollars (000s)</b>
Total capital expenditures (\$1,000)	864.27
Capital expenditures for buildings and other structures (\$1,000)	145.96
Capital expenditures for machinery and equipment (\$1,000)	718.31
Capital expenditures for automobiles, trucks, etc. (\$1,000)	30.99
Capital expenditures for computers and peripheral equip. (\$1,000)	41.43
Capital expenditures for all other machinery and equip. (\$1,000)	645.89

\*2023-2024 Forecasts

Source: Barnes Reports

# India

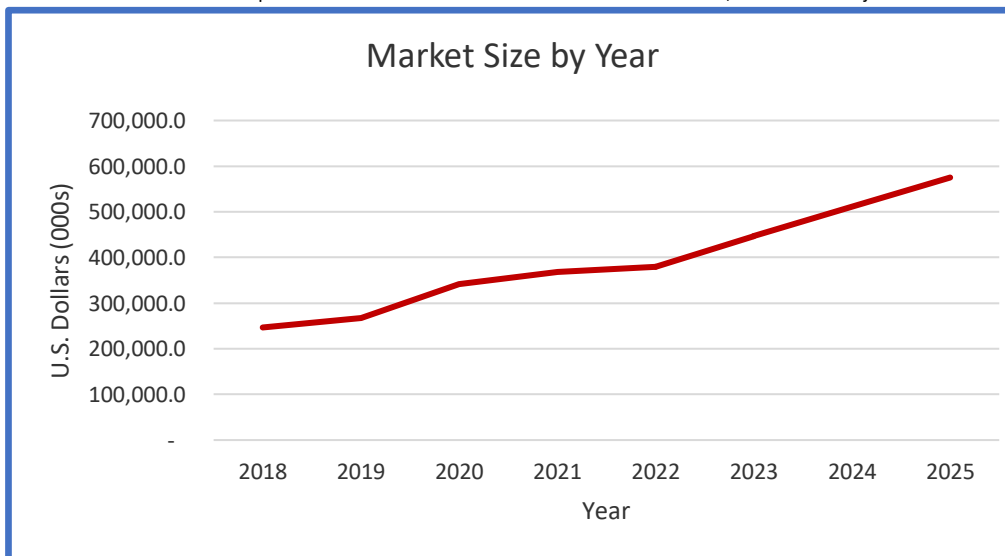
**Equipment Type: Continuous mining machines, borer, ripper, auger, and drum, including roadheading machines**

The market for this equipment in India is estimated to be \$511.5 million dollars in 2024 and is expected to change by 12.4 percent from 2024 to 2025. The market will be 43037.3 million Rupees in 2024 and is forecast to change by 18 percent from 2024 to 2025.

Market Sales (000s)		
Year	US Dollars	Rupees
2018	246,617.8	17,244,232.4
2019	267,775.2	18,984,458.6
2020	341,834.8	25,372,685.7
2021	368,774.1	27,475,107.0
2022	379,430.3	30,025,853.3
2023	446,476.0	36,469,108.0
2024	511,521.7	43,037,250.8
2025	575,085.9	49,605,410.3
2030	838,386.3	80,276,369.5
Y-to-Y Change	US Dollars	Rupees
2018-2019	8.6%	10.1%
2019-2020	27.7%	33.6%
2020-2021	7.9%	8.3%
2021-2022	2.9%	9.3%
2022-2023	17.7%	21.5%
2023-2024	14.6%	18.0%
2024-2025	12.4%	15.3%
CAGR 2025-2030	9.2%	61.8%

Source: Barnes Reports

\*2023-2024 Forecasts; 2025-2030 Projections



# India

**Equipment Type: Continuous mining machines, borer, ripper, auger, and drum, including roadheading machines**

## Costs and Value Added Estimates

The total cost of materials for this market in India will be \$225.82 million dollars in 2024 and the value added amount for the market will be \$251.85 million dollars. The cost of resales for this equipment is expected to reach \$19.83 million dollars in 2024.

<b>2024 Costs and Value Added</b>	<b>US Dollars (000s)</b>
Total cost of materials (\$1,000)	225,819.06
Cost of resales (\$1,000)	19,832.65
Cost of purchased fuels consumed (\$1,000)	712.75
Cost of purchased electricity (\$1,000)	2,859.18
Cost of contract work (\$1,000)	7,491.01
Value of resales (\$1,000)	28,595.13
Value added (\$1,000)	251,849.59

## Capital Expenses Estimates

The total capital expenses for this market in India will be \$12.14 million dollars in 2024 and the expenditures for machinery and equipment for the market will be \$10.09 million dollars. The expenditures for buildings for this equipment expected to reach \$2.05 million dollars in 2024.

<b>2024 Capital Expenses</b>	<b>US Dollars (000s)</b>
Total capital expenditures (\$1,000)	12,143.99
Capital expenditures for buildings and other structures (\$1,000)	2,050.96
Capital expenditures for machinery and equipment (\$1,000)	10,093.03
Capital expenditures for automobiles, trucks, etc. (\$1,000)	435.48
Capital expenditures for computers and peripheral equip. (\$1,000)	582.14
Capital expenditures for all other machinery and equip. (\$1,000)	9,075.42

\*2023-2024 Forecasts

Source: Barnes Reports

# Indonesia

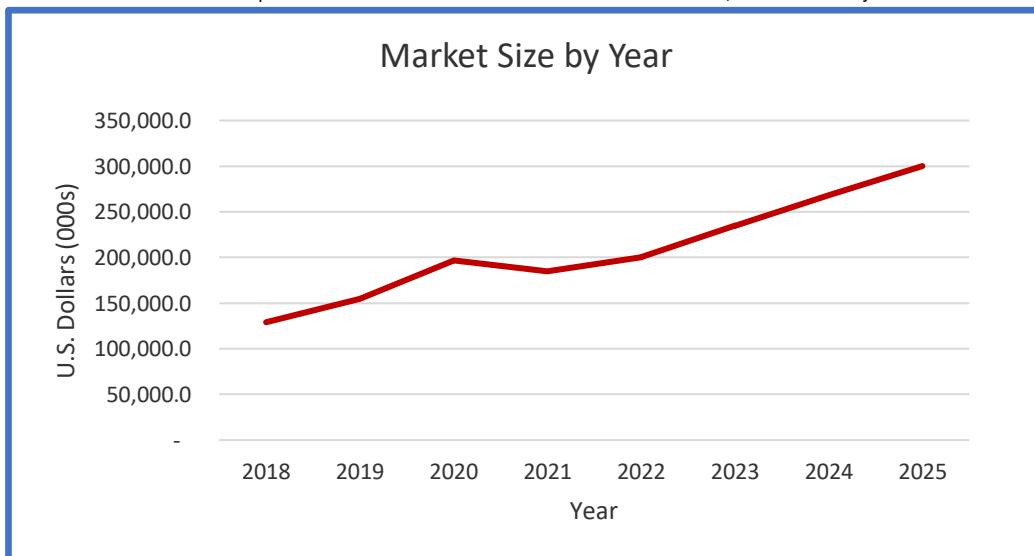
**Equipment Type: Continuous mining machines, borer, ripper, auger, and drum, including roadheading machines**

The market for this equipment in Indonesia is estimated to be \$268.0 million dollars in 2024 and is expected to change by 12 percent from 2024 to 2025. The market will be 4117582.7 million Rupiahs in 2024 and is forecast to change by 15.7 percent from 2024 to 2025.

Market Sales (000s)		
Year	US Dollars	Rupiahs
2018	129,033.1	1,837,036,768.7
2019	154,340.0	2,183,551,495.4
2020	197,027.0	2,873,087,869.2
2021	184,684.7	2,642,495,542.4
2022	200,375.6	2,990,577,328.9
2023	234,849.7	3,558,111,073.6
2024	267,996.2	4,117,582,688.3
2025	300,111.7	4,664,567,783.9
2030	442,043.5	7,244,851,333.0
Y-to-Y Change	US Dollars	Rupiahs
2018-2019	19.6%	18.9%
2019-2020	27.7%	31.6%
2020-2021	-6.3%	-8.0%
2021-2022	8.5%	13.2%
2022-2023	17.2%	19.0%
2023-2024	14.1%	15.7%
2024-2025	12.0%	13.3%
CAGR 2025-2030	9.5%	55.3%

Source: Barnes Reports

\*2023-2024 Forecasts; 2025-2030 Projections



# Indonesia

**Equipment Type: Continuous mining machines, borer, ripper, auger, and drum, including roadheading machines**

## Costs and Value Added Estimates

The total cost of materials for this market in Indonesia will be \$118.31 million dollars in 2024 and the value added amount for the market will be \$131.95 million dollars. The cost of resales for this equipment is expected to reach \$10.39 million dollars in 2024.

2024 Costs and Value Added	US Dollars (000s)
Total cost of materials (\$1,000)	118,311.02
Cost of resales (\$1,000)	10,390.71
Cost of purchased fuels consumed (\$1,000)	373.43
Cost of purchased electricity (\$1,000)	1,497.98
Cost of contract work (\$1,000)	3,924.69
Value of resales (\$1,000)	14,981.55
Value added (\$1,000)	131,948.93

## Capital Expenses Estimates

The total capital expenses for this market in Indonesia will be \$6.36 million dollars in 2024 and the expenditures for machinery and equipment for the market will be \$5.29 million dollars. The expenditures for buildings for this equipment expected to reach \$1.07 million dollars in 2024.

2024 Capital Expenses	US Dollars (000s)
Total capital expenditures (\$1,000)	6,362.48
Capital expenditures for buildings and other structures (\$1,000)	1,074.54
Capital expenditures for machinery and equipment (\$1,000)	5,287.94
Capital expenditures for automobiles, trucks, etc. (\$1,000)	228.15
Capital expenditures for computers and peripheral equip. (\$1,000)	304.99
Capital expenditures for all other machinery and equip. (\$1,000)	4,754.79

\*2023-2024 Forecasts

Source: Barnes Reports

# Ireland

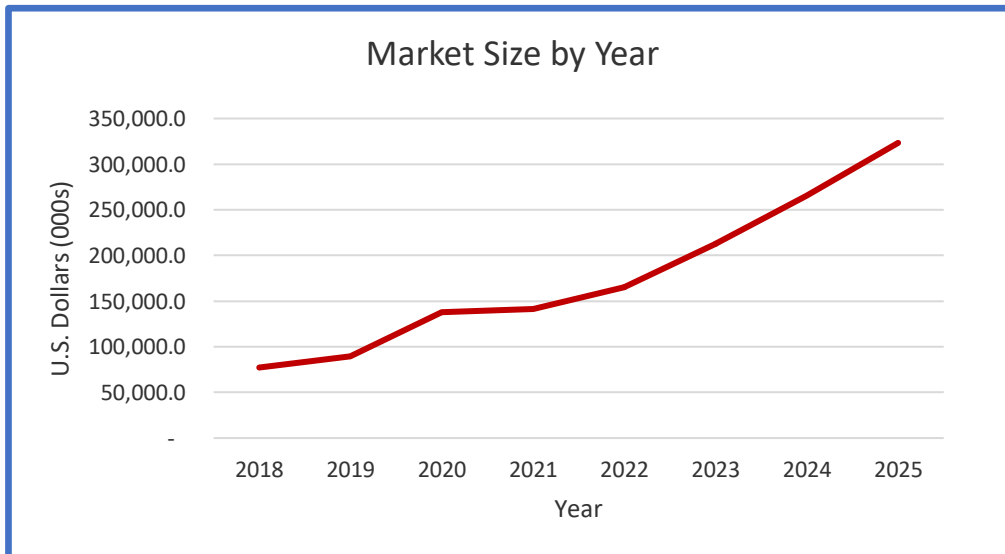
**Equipment Type: Continuous mining machines, borer, ripper, auger, and drum, including roadheading machines**

The market for this equipment in Ireland is estimated to be \$265.4 million dollars in 2024 and is expected to change by 21.8 percent from 2024 to 2025. The market will be 222.1 million Euros in 2024 and is forecast to change by 23.4 percent from 2024 to 2025.

Market Sales (000s)		
Year	US Dollars	Euros
2018	77,253.6	65,416.3
2019	89,426.2	79,882.3
2020	137,660.7	120,522.8
2021	141,166.0	119,355.0
2022	165,302.2	141,639.2
2023	212,730.0	180,078.7
2024	265,424.7	222,143.2
2025	323,311.8	267,832.6
2030	649,003.7	523,785.6
Y-to-Y Change	US Dollars	Euros
2018-2019	15.8%	22.1%
2019-2020	53.9%	50.9%
2020-2021	2.5%	-1.0%
2021-2022	17.1%	18.7%
2022-2023	28.7%	27.1%
2023-2024	24.8%	23.4%
2024-2025	21.8%	20.6%
CAGR 2025-2030	20.1%	95.6%

Source: Barnes Reports

\*2023-2024 Forecasts; 2025-2030 Projections



# Ireland

**Equipment Type: Continuous mining machines, borer, ripper, auger, and drum, including roadheading machines**

## Costs and Value Added Estimates

The total cost of materials for this market in Ireland will be \$117.18 million dollars in 2024 and the value added amount for the market will be \$130.68 million dollars. The cost of resales for this equipment is expected to reach \$10.29 million dollars in 2024.

<b>2024 Costs and Value Added</b>	<b>US Dollars (000s)</b>
Total cost of materials (\$1,000)	117,175.78
Cost of resales (\$1,000)	10,291.01
Cost of purchased fuels consumed (\$1,000)	369.84
Cost of purchased electricity (\$1,000)	1,483.61
Cost of contract work (\$1,000)	3,887.03
Value of resales (\$1,000)	14,837.79
Value added (\$1,000)	130,682.82

## Capital Expenses Estimates

The total capital expenses for this market in Ireland will be \$6.30 million dollars in 2024 and the expenditures for machinery and equipment for the market will be \$5.24 million dollars. The expenditures for buildings for this equipment expected to reach \$1.06 million dollars in 2024.

<b>2024 Capital Expenses</b>	<b>US Dollars (000s)</b>
Total capital expenditures (\$1,000)	6,301.42
Capital expenditures for buildings and other structures (\$1,000)	1,064.23
Capital expenditures for machinery and equipment (\$1,000)	5,237.20
Capital expenditures for automobiles, trucks, etc. (\$1,000)	225.97
Capital expenditures for computers and peripheral equip. (\$1,000)	302.07
Capital expenditures for all other machinery and equip. (\$1,000)	4,709.17

\*2023-2024 Forecasts

Source: Barnes Reports



# Israel

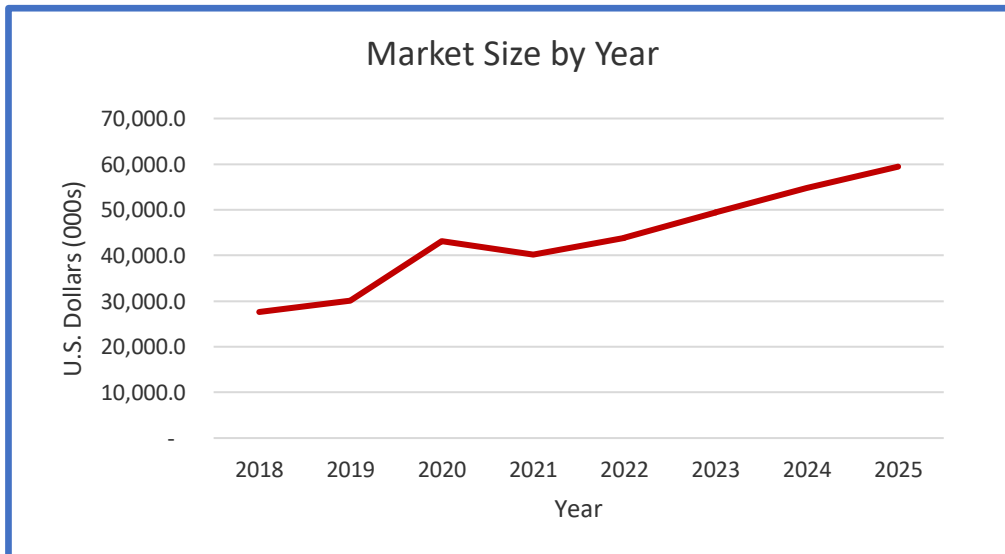
**Equipment Type: Continuous mining machines, borer, ripper, auger, and drum, including roadheading machines**

The market for this equipment in Israel is estimated to be \$54.7 million dollars in 2024 and is expected to change by 8.7 percent from 2024 to 2025. The market will be 163.3 million New Shekels in 2024 and is forecast to change by 6.5 percent from 2024 to 2025.

Market Sales (000s)		
Year	US Dollars	New Shekels
2018	27,619.7	99,170.3
2019	30,032.1	107,050.2
2020	43,169.8	148,608.1
2021	40,166.6	129,746.0
2022	43,887.7	141,956.4
2023	49,415.0	153,340.7
2024	54,703.9	163,322.7
2025	59,456.2	171,703.1
2030	80,570.4	195,322.4
Y-to-Y Change	US Dollars	New Shekels
2018-2019	8.7%	7.9%
2019-2020	43.7%	38.8%
2020-2021	-7.0%	-12.7%
2021-2022	9.3%	9.4%
2022-2023	12.6%	8.0%
2023-2024	10.7%	6.5%
2024-2025	8.7%	5.1%
CAGR 2025-2030	7.1%	13.8%

Source: Barnes Reports

\*2023-2024 Forecasts; 2025-2030 Projections



# Israel

**Equipment Type: Continuous mining machines, borer, ripper, auger, and drum, including roadheading machines**

## Costs and Value Added Estimates

The total cost of materials for this market in Israel will be \$24.15 million dollars in 2024 and the value added amount for the market will be \$26.93 million dollars. The cost of resales for this equipment is expected to reach \$2.12 million dollars in 2024.

<b>2024 Costs and Value Added</b>	<b>US Dollars (000s)</b>
Total cost of materials (\$1,000)	24,149.85
Cost of resales (\$1,000)	2,120.97
Cost of purchased fuels consumed (\$1,000)	76.22
Cost of purchased electricity (\$1,000)	305.77
Cost of contract work (\$1,000)	801.11
Value of resales (\$1,000)	3,058.06
Value added (\$1,000)	26,933.65

## Capital Expenses Estimates

The total capital expenses for this market in Israel will be \$1.30 million dollars in 2024 and the expenditures for machinery and equipment for the market will be \$1.08 million dollars. The expenditures for buildings for this equipment expected to reach \$0.22 million dollars in 2024.

<b>2024 Capital Expenses</b>	<b>US Dollars (000s)</b>
Total capital expenditures (\$1,000)	1,298.72
Capital expenditures for buildings and other structures (\$1,000)	219.34
Capital expenditures for machinery and equipment (\$1,000)	1,079.38
Capital expenditures for automobiles, trucks, etc. (\$1,000)	46.57
Capital expenditures for computers and peripheral equip. (\$1,000)	62.26
Capital expenditures for all other machinery and equip. (\$1,000)	970.56

\*2023-2024 Forecasts

Source: Barnes Reports

# Italy

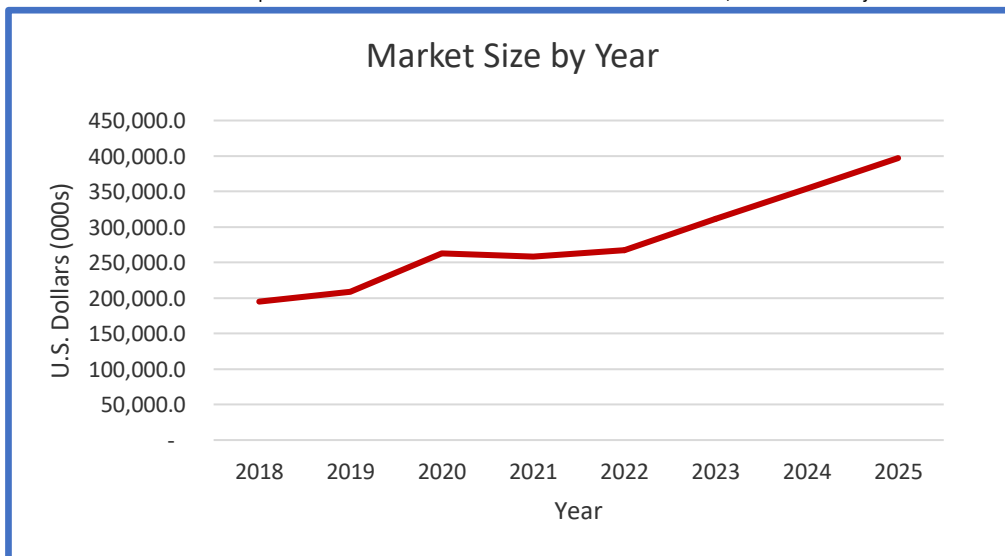
**Equipment Type: Continuous mining machines, borer, ripper, auger, and drum, including roadheading machines**

The market for this equipment in Italy is estimated to be \$354.2 million dollars in 2024 and is expected to change by 12.1 percent from 2024 to 2025. The market will be 293.3 million Euros in 2024 and is forecast to change by 12 percent from 2024 to 2025.

Market Sales (000s)		
Year	US Dollars	Euros
2018	194,987.2	165,109.8
2019	208,883.0	186,590.2
2020	262,993.7	230,252.7
2021	258,379.5	218,458.4
2022	267,299.8	228,513.0
2023	311,503.3	261,939.8
2024	354,207.4	293,311.8
2025	397,092.7	324,434.6
2030	583,232.0	447,206.7
Y-to-Y Change	US Dollars	Euros
2018-2019	7.1%	13.0%
2019-2020	25.9%	23.4%
2020-2021	-1.8%	-5.1%
2021-2022	3.5%	4.6%
2022-2023	16.5%	14.6%
2023-2024	13.7%	12.0%
2024-2025	12.1%	10.6%
CAGR 2025-2030	9.4%	37.8%

Source: Barnes Reports

\*2023-2024 Forecasts; 2025-2030 Projections



# Italy

**Equipment Type: Continuous mining machines, borer, ripper, auger, and drum, including roadheading machines**

## Costs and Value Added Estimates

The total cost of materials for this market in Italy will be \$156.37 million dollars in 2024 and the value added amount for the market will be \$174.40 million dollars. The cost of resales for this equipment is expected to reach \$13.73 million dollars in 2024.

<b>2024 Costs and Value Added</b>	<b>US Dollars (000s)</b>
Total cost of materials (\$1,000)	156,370.26
Cost of resales (\$1,000)	13,733.28
Cost of purchased fuels consumed (\$1,000)	493.55
Cost of purchased electricity (\$1,000)	1,979.87
Cost of contract work (\$1,000)	5,187.21
Value of resales (\$1,000)	19,800.93
Value added (\$1,000)	174,395.31

## Capital Expenses Estimates

The total capital expenses for this market in Italy will be \$8.41 million dollars in 2024 and the expenditures for machinery and equipment for the market will be \$6.99 million dollars. The expenditures for buildings for this equipment expected to reach \$1.42 million dollars in 2024.

<b>2024 Capital Expenses</b>	<b>US Dollars (000s)</b>
Total capital expenditures (\$1,000)	8,409.21
Capital expenditures for buildings and other structures (\$1,000)	1,420.21
Capital expenditures for machinery and equipment (\$1,000)	6,989.00
Capital expenditures for automobiles, trucks, etc. (\$1,000)	301.55
Capital expenditures for computers and peripheral equip. (\$1,000)	403.10
Capital expenditures for all other machinery and equip. (\$1,000)	6,284.35

\*2023-2024 Forecasts

Source: Barnes Reports

# Japan

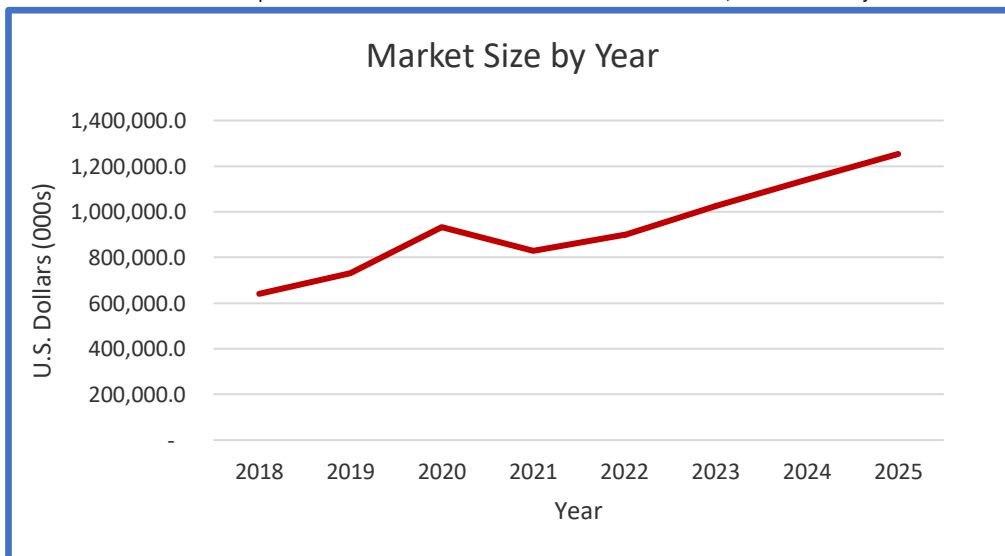
**Equipment Type: Continuous mining machines, borer, ripper, auger, and drum, including roadheading machines**

The market for this equipment in Japan is estimated to be \$1,141.6 million dollars in 2024 and is expected to change by 9.8 percent from 2024 to 2025. The market will be 117510.2 million Yens in 2024 and is forecast to change by 9.4 percent from 2024 to 2025.

Market Sales (000s)		
Year	US Dollars	Yens
2018	640,693.8	70,747,445.7
2019	731,828.3	79,776,362.2
2020	932,063.6	99,520,706.7
2021	829,164.3	91,004,371.3
2022	898,022.0	95,878,845.9
2023	1,024,994.0	107,380,393.9
2024	1,141,631.0	117,510,228.9
2025	1,253,388.3	127,044,948.2
2030	1,705,505.6	160,803,761.6
Y-to-Y Change	US Dollars	Yens
2018-2019	14.2%	12.8%
2019-2020	27.4%	24.7%
2020-2021	-11.0%	-8.6%
2021-2022	8.3%	5.4%
2022-2023	14.1%	12.0%
2023-2024	11.4%	9.4%
2024-2025	9.8%	8.1%
CAGR 2025-2030	7.2%	26.6%

Source: Barnes Reports

\*2023-2024 Forecasts; 2025-2030 Projections



# Japan

**Equipment Type: Continuous mining machines, borer, ripper, auger, and drum, including roadheading machines**

## Costs and Value Added Estimates

The total cost of materials for this market in Japan will be \$503.99 million dollars in 2024 and the value added amount for the market will be \$562.09 million dollars. The cost of resales for this equipment is expected to reach \$44.26 million dollars in 2024.

<b>2024 Costs and Value Added</b>	<b>US Dollars (000s)</b>
Total cost of materials (\$1,000)	503,990.47
Cost of resales (\$1,000)	44,263.16
Cost of purchased fuels consumed (\$1,000)	1,590.75
Cost of purchased electricity (\$1,000)	6,381.22
Cost of contract work (\$1,000)	16,718.69
Value of resales (\$1,000)	63,819.56
Value added (\$1,000)	562,086.27

## Capital Expenses Estimates

The total capital expenses for this market in Japan will be \$27.10 million dollars in 2024 and the expenditures for machinery and equipment for the market will be \$22.53 million dollars. The expenditures for buildings for this equipment expected to reach \$4.58 million dollars in 2024.

<b>2024 Capital Expenses</b>	<b>US Dollars (000s)</b>
Total capital expenditures (\$1,000)	27,103.37
Capital expenditures for buildings and other structures (\$1,000)	4,577.41
Capital expenditures for machinery and equipment (\$1,000)	22,525.96
Capital expenditures for automobiles, trucks, etc. (\$1,000)	971.91
Capital expenditures for computers and peripheral equip. (\$1,000)	1,299.23
Capital expenditures for all other machinery and equip. (\$1,000)	20,254.82

\*2023-2024 Forecasts

Source: Barnes Reports

# South Korea

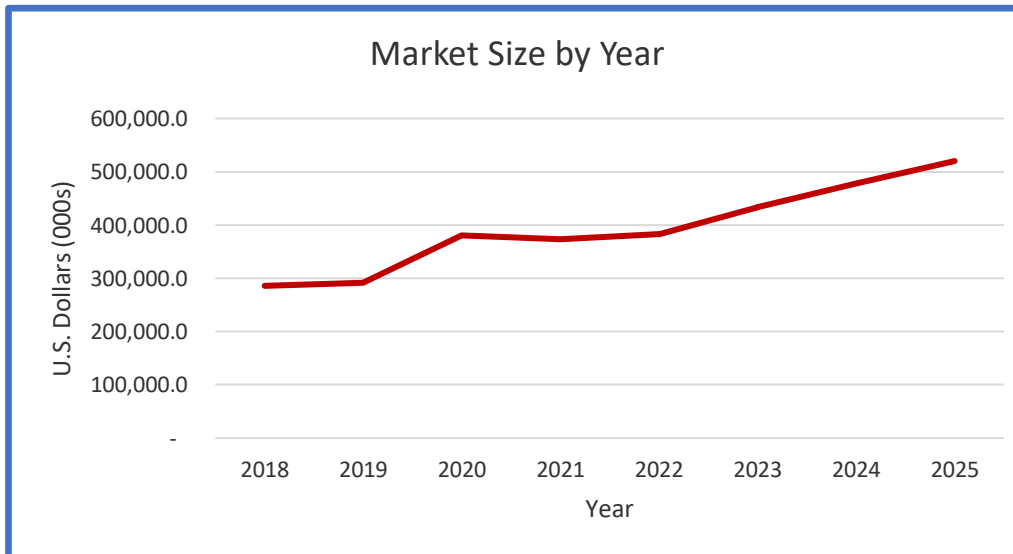
**Equipment Type: Continuous mining machines, borer, ripper, auger, and drum, including roadheading machines**

The market for this equipment in South Korea is estimated to be \$478.5 million dollars in 2024 and is expected to change by 8.7 percent from 2024 to 2025. The market will be 603803.6 million Wons in 2024 and is forecast to change by 12.5 percent from 2024 to 2025.

Market Sales (000s)		
Year	US Dollars	Wons
2018	285,781.8	314,502,828.3
2019	291,873.0	340,136,347.7
2020	380,550.9	449,151,269.7
2021	372,972.6	426,665,045.2
2022	382,504.7	464,108,167.9
2023	433,271.2	536,504,258.0
2024	478,463.2	603,803,574.5
2025	520,049.5	666,700,898.8
2030	682,559.3	934,001,290.1
Y-to-Y Change	US Dollars	Wons
2018-2019	2.1%	8.2%
2019-2020	30.4%	32.1%
2020-2021	-2.0%	-5.0%
2021-2022	2.6%	8.8%
2022-2023	13.3%	15.6%
2023-2024	10.4%	12.5%
2024-2025	8.7%	10.4%
CAGR 2025-2030	6.2%	40.1%

Source: Barnes Reports

\*2023-2024 Forecasts; 2025-2030 Projections



# South Korea

**Equipment Type: Continuous mining machines, borer, ripper, auger, and drum, including roadheading machines**

## Costs and Value Added Estimates

The total cost of materials for this market in South Korea will be \$211.22 million dollars in 2024 and the value added amount for the market will be \$235.57 million dollars. The cost of resales for this equipment is expected to reach \$18.55 million dollars in 2024.

<b>2024 Costs and Value Added</b>	<b>US Dollars (000s)</b>
Total cost of materials (\$1,000)	211,224.89
Cost of resales (\$1,000)	18,550.91
Cost of purchased fuels consumed (\$1,000)	666.69
Cost of purchased electricity (\$1,000)	2,674.40
Cost of contract work (\$1,000)	7,006.88
Value of resales (\$1,000)	26,747.09
Value added (\$1,000)	235,573.13

## Capital Expenses Estimates

The total capital expenses for this market in South Korea will be \$11.36 million dollars in 2024 and the expenditures for machinery and equipment for the market will be \$9.44 million dollars. The expenditures for buildings for this equipment expected to reach \$1.92 million dollars in 2024.

<b>2024 Capital Expenses</b>	<b>US Dollars (000s)</b>
Total capital expenditures (\$1,000)	11,359.15
Capital expenditures for buildings and other structures (\$1,000)	1,918.41
Capital expenditures for machinery and equipment (\$1,000)	9,440.74
Capital expenditures for automobiles, trucks, etc. (\$1,000)	407.33
Capital expenditures for computers and peripheral equip. (\$1,000)	544.51
Capital expenditures for all other machinery and equip. (\$1,000)	8,488.90

\*2023-2024 Forecasts

Source: Barnes Reports



# Malaysia

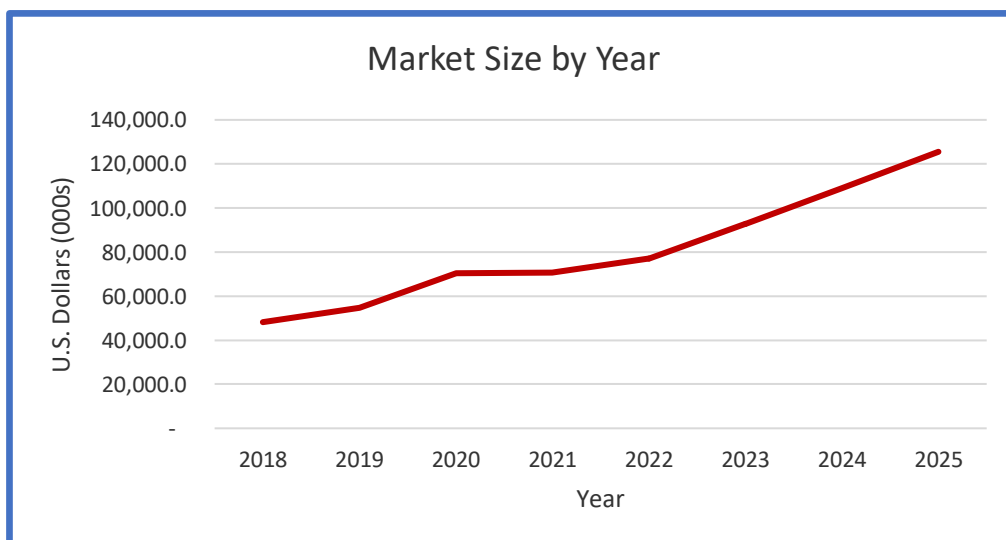
**Equipment Type: Continuous mining machines, borer, ripper, auger, and drum, including roadheading machines**

The market for this equipment in Malaysia is estimated to be \$108.9 million dollars in 2024 and is expected to change by 15.3 percent from 2024 to 2025. The market will be 436.7 million Ringgits in 2024 and is forecast to change by 15.9 percent from 2024 to 2025.

Market Sales (000s)		
Year	US Dollars	Ringgits
2018	48,193.5	194,465.5
2019	54,734.3	226,736.9
2020	70,311.2	295,553.2
2021	70,801.8	293,353.0
2022	77,021.4	317,125.5
2023	92,813.1	376,966.3
2024	108,901.8	436,724.2
2025	125,513.8	497,710.1
2030	205,653.5	778,713.3
Y-to-Y Change	US Dollars	Ringgits
2018-2019	13.6%	16.6%
2019-2020	28.5%	30.4%
2020-2021	0.7%	-0.7%
2021-2022	8.8%	8.1%
2022-2023	20.5%	18.9%
2023-2024	17.3%	15.9%
2024-2025	15.3%	14.0%
CAGR 2025-2030	12.8%	56.5%

Source: Barnes Reports

\*2023-2024 Forecasts; 2025-2030 Projections



# Malaysia

**Equipment Type: Continuous mining machines, borer, ripper, auger, and drum, including roadheading machines**

## Costs and Value Added Estimates

The total cost of materials for this market in Malaysia will be \$48.08 million dollars in 2024 and the value added amount for the market will be \$53.62 million dollars. The cost of resales for this equipment is expected to reach \$4.22 million dollars in 2024.

<b>2024 Costs and Value Added</b>	<b>US Dollars (000s)</b>
Total cost of materials (\$1,000)	48,076.36
Cost of resales (\$1,000)	4,222.33
Cost of purchased fuels consumed (\$1,000)	151.74
Cost of purchased electricity (\$1,000)	608.71
Cost of contract work (\$1,000)	1,594.82
Value of resales (\$1,000)	6,087.84
Value added (\$1,000)	53,618.20

## Capital Expenses Estimates

The total capital expenses for this market in Malaysia will be \$2.59 million dollars in 2024 and the expenditures for machinery and equipment for the market will be \$2.15 million dollars. The expenditures for buildings for this equipment expected to reach \$0.44 million dollars in 2024.

<b>2024 Capital Expenses</b>	<b>US Dollars (000s)</b>
Total capital expenditures (\$1,000)	2,585.43
Capital expenditures for buildings and other structures (\$1,000)	436.65
Capital expenditures for machinery and equipment (\$1,000)	2,148.78
Capital expenditures for automobiles, trucks, etc. (\$1,000)	92.71
Capital expenditures for computers and peripheral equip. (\$1,000)	123.94
Capital expenditures for all other machinery and equip. (\$1,000)	1,932.14

\*2023-2024 Forecasts

Source: Barnes Reports

# Mexico

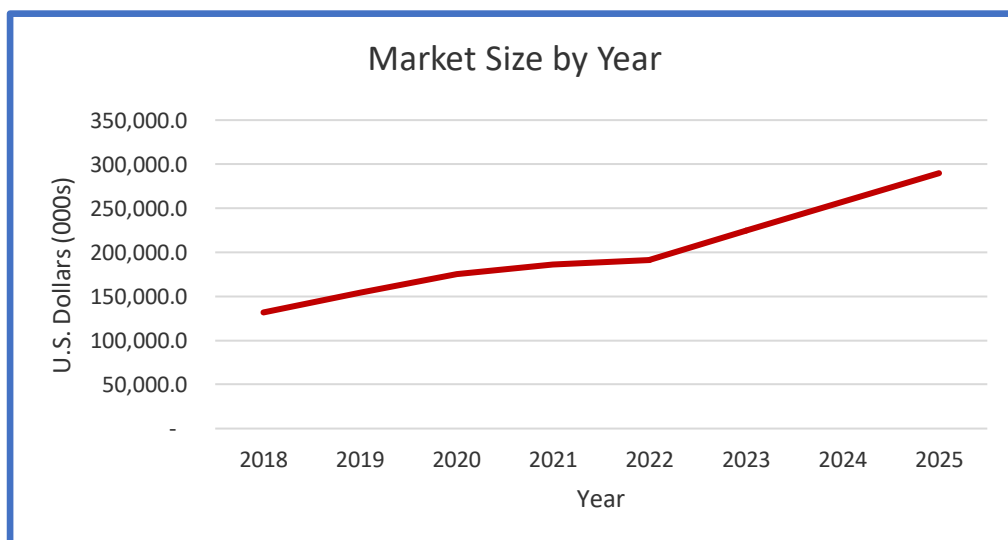
**Equipment Type: Continuous mining machines, borer, ripper, auger, and drum, including roadheading machines**

The market for this equipment in Mexico is estimated to be \$257.0 million dollars in 2024 and is expected to change by 12.7 percent from 2024 to 2025. The market will be 5676 million Pesos in 2024 and is forecast to change by 16.2 percent from 2024 to 2025.

Market Sales (000s)		
Year	US Dollars	Pesos
2018	131,791.4	2,536,234.1
2019	153,904.6	2,964,756.4
2020	175,532.7	3,771,425.4
2021	186,094.3	3,772,580.7
2022	191,392.8	4,096,337.2
2023	224,573.2	4,885,188.7
2024	257,007.3	5,676,007.7
2025	289,775.4	6,480,048.1
2030	436,647.5	10,243,736.9
Y-to-Y Change	US Dollars	Pesos
2018-2019	16.8%	16.9%
2019-2020	14.1%	27.2%
2020-2021	6.0%	0.0%
2021-2022	2.8%	8.6%
2022-2023	17.3%	19.3%
2023-2024	14.4%	16.2%
2024-2025	12.7%	14.2%
CAGR 2025-2030	10.1%	58.1%

Source: Barnes Reports

\*2023-2024 Forecasts; 2025-2030 Projections



# Mexico

**Equipment Type: Continuous mining machines, borer, ripper, auger, and drum, including roadheading machines**

## Costs and Value Added Estimates

The total cost of materials for this market in Mexico will be \$113.46 million dollars in 2024 and the value added amount for the market will be \$126.54 million dollars. The cost of resales for this equipment is expected to reach \$9.96 million dollars in 2024.

<b>2024 Costs and Value Added</b>	<b>US Dollars (000s)</b>
Total cost of materials (\$1,000)	113,459.81
Cost of resales (\$1,000)	9,964.65
Cost of purchased fuels consumed (\$1,000)	358.11
Cost of purchased electricity (\$1,000)	1,436.56
Cost of contract work (\$1,000)	3,763.76
Value of resales (\$1,000)	14,367.25
Value added (\$1,000)	126,538.51

## Capital Expenses Estimates

The total capital expenses for this market in Mexico will be \$6.10 million dollars in 2024 and the expenditures for machinery and equipment for the market will be \$5.07 million dollars. The expenditures for buildings for this equipment expected to reach \$1.03 million dollars in 2024.

<b>2024 Capital Expenses</b>	<b>US Dollars (000s)</b>
Total capital expenditures (\$1,000)	6,101.59
Capital expenditures for buildings and other structures (\$1,000)	1,030.48
Capital expenditures for machinery and equipment (\$1,000)	5,071.11
Capital expenditures for automobiles, trucks, etc. (\$1,000)	218.80
Capital expenditures for computers and peripheral equip. (\$1,000)	292.49
Capital expenditures for all other machinery and equip. (\$1,000)	4,559.82

\*2023-2024 Forecasts

Source: Barnes Reports

# Netherlands

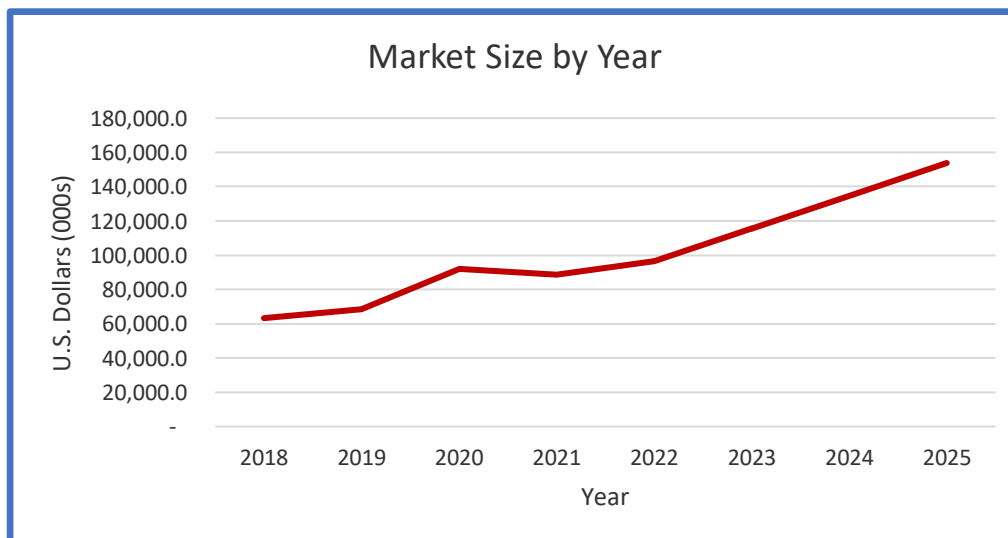
**Equipment Type: Continuous mining machines, borer, ripper, auger, and drum, including roadheading machines**

The market for this equipment in Netherlands is estimated to be \$134.7 million dollars in 2024 and is expected to change by 14.2 percent from 2024 to 2025. The market will be 110.2 million Euros in 2024 and is forecast to change by 13.9 percent from 2024 to 2025.

Market Sales (000s)		
Year	US Dollars	Euros
2018	63,278.5	53,582.5
2019	68,642.6	61,316.8
2020	92,133.6	80,663.6
2021	88,716.8	75,009.6
2022	96,501.0	82,843.3
2023	115,577.3	96,780.1
2024	134,688.8	110,193.5
2025	153,814.5	123,314.8
2030	241,367.8	178,110.9
Y-to-Y Change	US Dollars	Euros
2018-2019	8.5%	14.4%
2019-2020	34.2%	31.6%
2020-2021	-3.7%	-7.0%
2021-2022	8.8%	10.4%
2022-2023	19.8%	16.8%
2023-2024	16.5%	13.9%
2024-2025	14.2%	11.9%
CAGR 2025-2030	11.4%	44.4%

Source: Barnes Reports

\*2023-2024 Forecasts; 2025-2030 Projections



# Netherlands

**Equipment Type: Continuous mining machines, borer, ripper, auger, and drum, including roadheading machines**

## Costs and Value Added Estimates

The total cost of materials for this market in Netherlands will be \$59.46 million dollars in 2024 and the value added amount for the market will be \$66.31 million dollars. The cost of resales for this equipment is expected to reach \$5.22 million dollars in 2024.

<b>2024 Costs and Value Added</b>	<b>US Dollars (000s)</b>
Total cost of materials (\$1,000)	59,460.43
Cost of resales (\$1,000)	5,222.14
Cost of purchased fuels consumed (\$1,000)	187.68
Cost of purchased electricity (\$1,000)	752.85
Cost of contract work (\$1,000)	1,972.46
Value of resales (\$1,000)	7,529.38
Value added (\$1,000)	66,314.53

## Capital Expenses Estimates

The total capital expenses for this market in Netherlands will be \$3.20 million dollars in 2024 and the expenditures for machinery and equipment for the market will be \$2.66 million dollars. The expenditures for buildings for this equipment expected to reach \$0.54 million dollars in 2024.

<b>2024 Capital Expenses</b>	<b>US Dollars (000s)</b>
Total capital expenditures (\$1,000)	3,197.64
Capital expenditures for buildings and other structures (\$1,000)	540.04
Capital expenditures for machinery and equipment (\$1,000)	2,657.60
Capital expenditures for automobiles, trucks, etc. (\$1,000)	114.67
Capital expenditures for computers and peripheral equip. (\$1,000)	153.28
Capital expenditures for all other machinery and equip. (\$1,000)	2,389.65

\*2023-2024 Forecasts

Source: Barnes Reports

# Nigeria

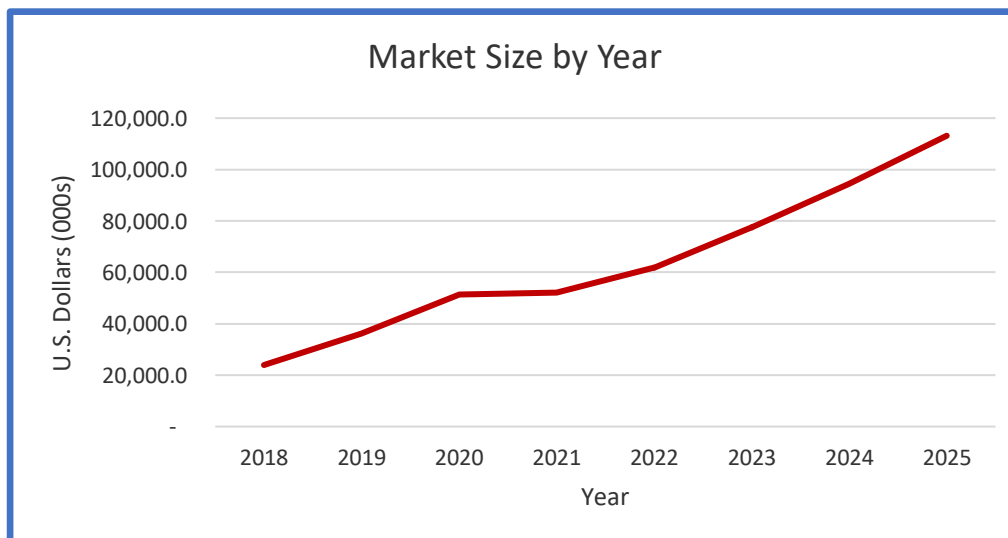
**Equipment Type: Continuous mining machines, borer, ripper, auger, and drum, including roadheading machines**

The market for this equipment in Nigeria is estimated to be \$94.4 million dollars in 2024 and is expected to change by 19.8 percent from 2024 to 2025. The market will be 41119.3 million Nairas in 2024 and is forecast to change by 25.8 percent from 2024 to 2025.

Market Sales (000s)		
Year	US Dollars	Nairas
2018	23,944.7	7,763,068.6
2019	36,141.1	11,745,861.7
2020	51,280.2	18,297,940.6
2021	52,098.3	20,808,833.6
2022	61,786.4	25,178,937.0
2023	77,509.9	32,689,664.5
2024	94,418.9	41,119,284.4
2025	113,141.3	50,625,112.8
2030	213,887.4	107,849,633.1
Y-to-Y Change	US Dollars	Nairas
2018-2019	50.9%	51.3%
2019-2020	41.9%	55.8%
2020-2021	1.6%	13.7%
2021-2022	18.6%	21.0%
2022-2023	25.4%	29.8%
2023-2024	21.8%	25.8%
2024-2025	19.8%	23.1%
CAGR 2025-2030	17.8%	113.0%

Source: Barnes Reports

\*2023-2024 Forecasts; 2025-2030 Projections



# Nigeria

**Equipment Type: Continuous mining machines, borer, ripper, auger, and drum, including roadheading machines**

## Costs and Value Added Estimates

The total cost of materials for this market in Nigeria will be \$41.68 million dollars in 2024 and the value added amount for the market will be \$46.49 million dollars. The cost of resales for this equipment is expected to reach \$3.66 million dollars in 2024.

<b>2024 Costs and Value Added</b>	<b>US Dollars (000s)</b>
Total cost of materials (\$1,000)	41,682.65
Cost of resales (\$1,000)	3,660.80
Cost of purchased fuels consumed (\$1,000)	131.56
Cost of purchased electricity (\$1,000)	527.76
Cost of contract work (\$1,000)	1,382.72
Value of resales (\$1,000)	5,278.21
Value added (\$1,000)	46,487.48

## Capital Expenses Estimates

The total capital expenses for this market in Nigeria will be \$2.24 million dollars in 2024 and the expenditures for machinery and equipment for the market will be \$1.86 million dollars. The expenditures for buildings for this equipment expected to reach \$0.38 million dollars in 2024.

<b>2024 Capital Expenses</b>	<b>US Dollars (000s)</b>
Total capital expenditures (\$1,000)	2,241.59
Capital expenditures for buildings and other structures (\$1,000)	378.58
Capital expenditures for machinery and equipment (\$1,000)	1,863.01
Capital expenditures for automobiles, trucks, etc. (\$1,000)	80.38
Capital expenditures for computers and peripheral equip. (\$1,000)	107.45
Capital expenditures for all other machinery and equip. (\$1,000)	1,675.18

\*2023-2024 Forecasts

Source: Barnes Reports



# Norway

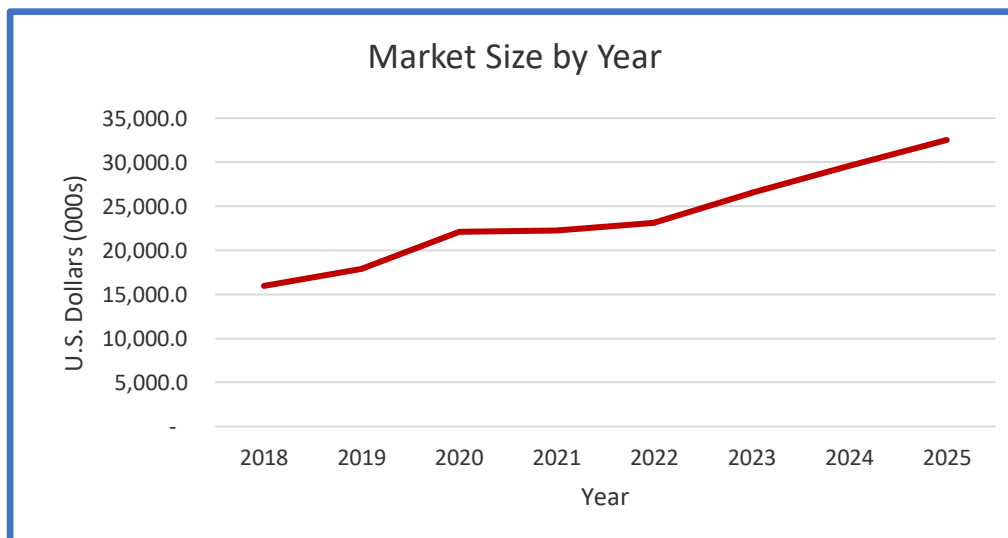
**Equipment Type: Continuous mining machines, borer, ripper, auger, and drum, including roadheading machines**

The market for this equipment in Norway is estimated to be \$29.6 million dollars in 2024 and is expected to change by 9.8 percent from 2024 to 2025. The market will be 277.8 million Kroner in 2024 and is forecast to change by 14.1 percent from 2024 to 2025.

Market Sales (000s)		
Year	US Dollars	Krones
2018	15,962.6	129,815.7
2019	17,920.3	157,698.8
2020	22,078.5	207,887.7
2021	22,255.9	191,178.4
2022	23,129.5	207,452.1
2023	26,513.2	243,396.7
2024	29,614.8	277,834.0
2025	32,522.5	310,686.6
2030	44,431.5	464,664.5
Y-to-Y Change	US Dollars	Krones
2018-2019	12.3%	21.5%
2019-2020	23.2%	31.8%
2020-2021	0.8%	-8.0%
2021-2022	3.9%	8.5%
2022-2023	14.6%	17.3%
2023-2024	11.7%	14.1%
2024-2025	9.8%	11.8%
CAGR 2025-2030	7.3%	49.6%

Source: Barnes Reports

\*2023-2024 Forecasts; 2025-2030 Projections



# Norway

**Equipment Type: Continuous mining machines, borer, ripper, auger, and drum, including roadheading machines**

## Costs and Value Added Estimates

The total cost of materials for this market in Norway will be \$13.07 million dollars in 2024 and the value added amount for the market will be \$14.58 million dollars. The cost of resales for this equipment is expected to reach \$1.15 million dollars in 2024.

<b>2024 Costs and Value Added</b>	<b>US Dollars (000s)</b>
Total cost of materials (\$1,000)	13,073.91
Cost of resales (\$1,000)	1,148.22
Cost of purchased fuels consumed (\$1,000)	41.27
Cost of purchased electricity (\$1,000)	165.53
Cost of contract work (\$1,000)	433.70
Value of resales (\$1,000)	1,655.53
Value added (\$1,000)	14,580.96

## Capital Expenses Estimates

The total capital expenses for this market in Norway will be \$0.70 million dollars in 2024 and the expenditures for machinery and equipment for the market will be \$0.58 million dollars. The expenditures for buildings for this equipment expected to reach \$0.12 million dollars in 2024.

<b>2024 Capital Expenses</b>	<b>US Dollars (000s)</b>
Total capital expenditures (\$1,000)	703.08
Capital expenditures for buildings and other structures (\$1,000)	118.74
Capital expenditures for machinery and equipment (\$1,000)	584.34
Capital expenditures for automobiles, trucks, etc. (\$1,000)	25.21
Capital expenditures for computers and peripheral equip. (\$1,000)	33.70
Capital expenditures for all other machinery and equip. (\$1,000)	525.43

\*2023-2024 Forecasts

Source: Barnes Reports

# Pakistan

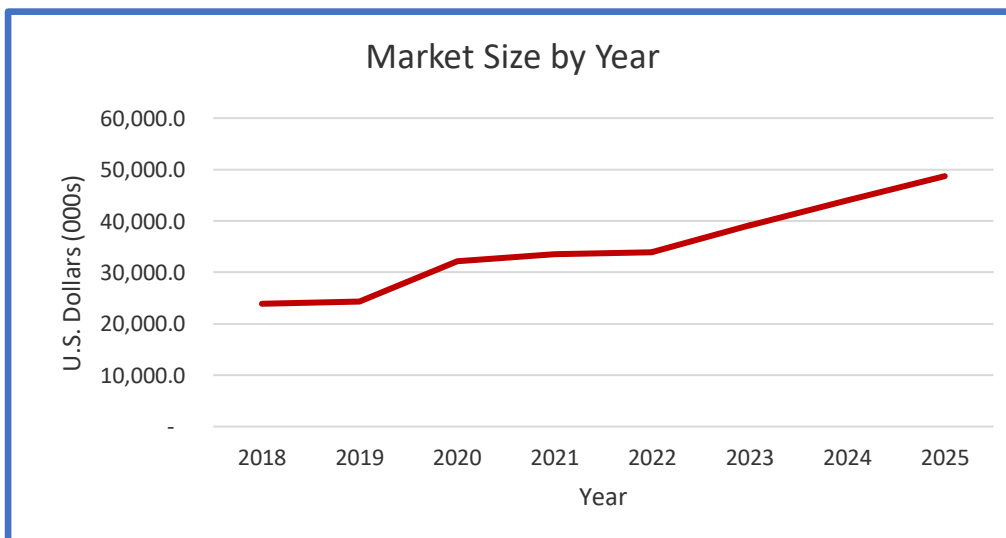
**Equipment Type: Continuous mining machines, borer, ripper, auger, and drum, including roadheading machines**

The market for this equipment in Pakistan is estimated to be \$44.0 million dollars in 2024 and is expected to change by 10.6 percent from 2024 to 2025. The market will be 9320.3 million Rupees in 2024 and is forecast to change by 20.6 percent from 2024 to 2025.

Market Sales (000s)		
Year	US Dollars	Rupees
2018	23,887.9	2,628,726.6
2019	24,259.0	3,310,914.9
2020	32,116.9	5,082,292.3
2021	33,556.2	5,376,068.8
2022	33,942.7	6,220,078.1
2023	39,154.8	7,730,619.6
2024	44,030.5	9,320,326.6
2025	48,708.9	10,939,772.8
2030	68,279.8	18,999,947.0
Y-to-Y Change	US Dollars	Rupees
2018-2019	1.6%	26.0%
2019-2020	32.4%	53.5%
2020-2021	4.5%	5.8%
2021-2022	1.2%	15.7%
2022-2023	15.4%	24.3%
2023-2024	12.5%	20.6%
2024-2025	10.6%	17.4%
CAGR 2025-2030	8.0%	73.7%

Source: Barnes Reports

\*2023-2024 Forecasts; 2025-2030 Projections



# Pakistan

**Equipment Type: Continuous mining machines, borer, ripper, auger, and drum, including roadheading machines**

## Costs and Value Added Estimates

The total cost of materials for this market in Pakistan will be \$19.44 million dollars in 2024 and the value added amount for the market will be \$21.68 million dollars. The cost of resales for this equipment is expected to reach \$1.71 million dollars in 2024.

<b>2024 Costs and Value Added</b>	<b>US Dollars (000s)</b>
Total cost of materials (\$1,000)	19,437.92
Cost of resales (\$1,000)	1,707.14
Cost of purchased fuels consumed (\$1,000)	61.35
Cost of purchased electricity (\$1,000)	246.11
Cost of contract work (\$1,000)	644.81
Value of resales (\$1,000)	2,461.39
Value added (\$1,000)	21,678.56

## Capital Expenses Estimates

The total capital expenses for this market in Pakistan will be \$1.05 million dollars in 2024 and the expenditures for machinery and equipment for the market will be \$0.87 million dollars. The expenditures for buildings for this equipment expected to reach \$0.18 million dollars in 2024.

<b>2024 Capital Expenses</b>	<b>US Dollars (000s)</b>
Total capital expenditures (\$1,000)	1,045.32
Capital expenditures for buildings and other structures (\$1,000)	176.54
Capital expenditures for machinery and equipment (\$1,000)	868.78
Capital expenditures for automobiles, trucks, etc. (\$1,000)	37.48
Capital expenditures for computers and peripheral equip. (\$1,000)	50.11
Capital expenditures for all other machinery and equip. (\$1,000)	781.19

\*2023-2024 Forecasts

Source: Barnes Reports

# Philippines

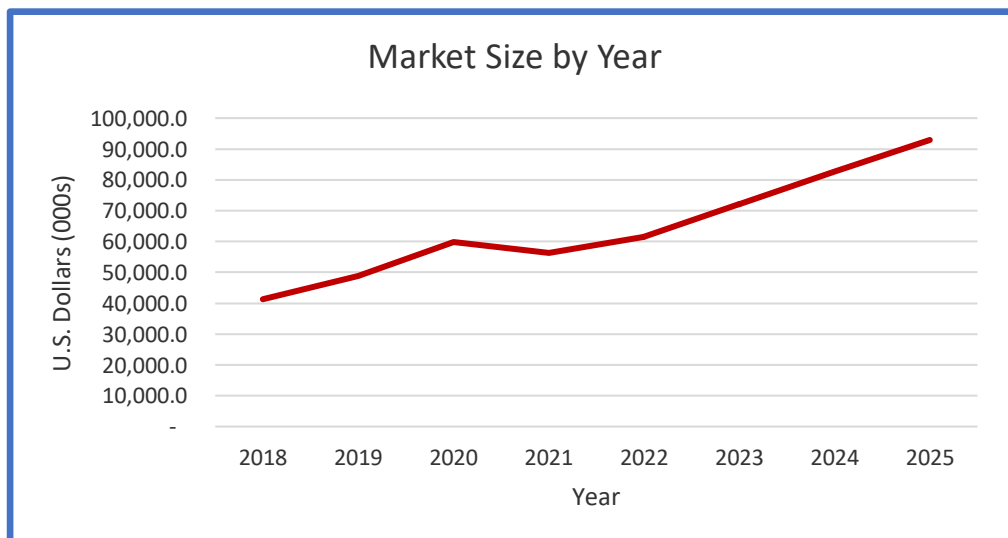
**Equipment Type: Continuous mining machines, borer, ripper, auger, and drum, including roadheading machines**

The market for this equipment in Philippines is estimated to be \$82.7 million dollars in 2024 and is expected to change by 12.3 percent from 2024 to 2025. The market will be 4055 million Pesos in 2024 and is forecast to change by 13.1 percent from 2024 to 2025.

Market Sales (000s)		
Year	US Dollars	Pesos
2018	41,285.4	2,174,147.5
2019	48,838.3	2,529,621.2
2020	59,819.6	2,968,493.4
2021	56,230.4	2,769,603.9
2022	61,536.7	3,105,248.9
2023	72,138.9	3,585,987.4
2024	82,727.1	4,055,044.8
2025	92,912.9	4,498,071.2
2030	134,443.6	6,188,984.0
Y-to-Y Change	US Dollars	Pesos
2018-2019	18.3%	16.4%
2019-2020	22.5%	17.3%
2020-2021	-6.0%	-6.7%
2021-2022	9.4%	12.1%
2022-2023	17.2%	15.5%
2023-2024	14.7%	13.1%
2024-2025	12.3%	10.9%
CAGR 2025-2030	8.9%	37.6%

Source: Barnes Reports

\*2023-2024 Forecasts; 2025-2030 Projections



# Philippines

**Equipment Type: Continuous mining machines, borer, ripper, auger, and drum, including roadheading machines**

## Costs and Value Added Estimates

The total cost of materials for this market in Philippines will be \$36.52 million dollars in 2024 and the value added amount for the market will be \$40.73 million dollars. The cost of resales for this equipment is expected to reach \$3.21 million dollars in 2024.

<b>2024 Costs and Value Added</b>	<b>US Dollars (000s)</b>
Total cost of materials (\$1,000)	36,521.13
Cost of resales (\$1,000)	3,207.48
Cost of purchased fuels consumed (\$1,000)	115.27
Cost of purchased electricity (\$1,000)	462.41
Cost of contract work (\$1,000)	1,211.50
Value of resales (\$1,000)	4,624.62
Value added (\$1,000)	40,730.99

## Capital Expenses Estimates

The total capital expenses for this market in Philippines will be \$1.96 million dollars in 2024 and the expenditures for machinery and equipment for the market will be \$1.63 million dollars. The expenditures for buildings for this equipment expected to reach \$0.33 million dollars in 2024.

<b>2024 Capital Expenses</b>	<b>US Dollars (000s)</b>
Total capital expenditures (\$1,000)	1,964.02
Capital expenditures for buildings and other structures (\$1,000)	331.70
Capital expenditures for machinery and equipment (\$1,000)	1,632.32
Capital expenditures for automobiles, trucks, etc. (\$1,000)	70.43
Capital expenditures for computers and peripheral equip. (\$1,000)	94.15
Capital expenditures for all other machinery and equip. (\$1,000)	1,467.74

\*2023-2024 Forecasts

Source: Barnes Reports

# Poland

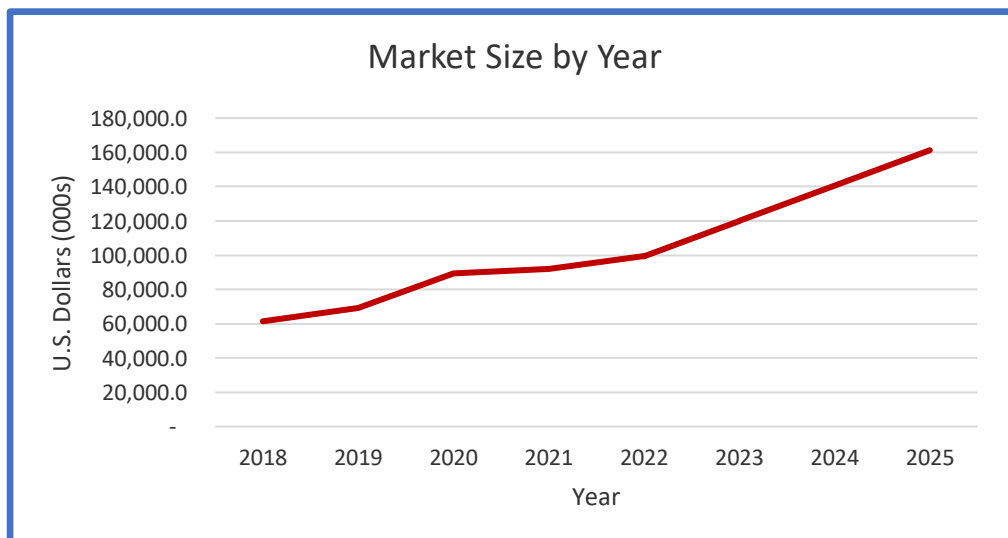
**Equipment Type: Continuous mining machines, borer, ripper, auger, and drum, including roadheading machines**

The market for this equipment in Poland is estimated to be \$140.7 million dollars in 2024 and is expected to change by 14.6 percent from 2024 to 2025. The market will be 558.7 million Zlotys in 2024 and is forecast to change by 17.2 percent from 2024 to 2025.

Market Sales (000s)		
Year	US Dollars	Zlotys
2018	61,420.1	221,831.1
2019	69,396.9	266,440.6
2020	89,532.4	349,149.4
2021	91,894.2	354,887.6
2022	99,319.5	395,354.0
2023	119,923.3	476,798.8
2024	140,684.2	558,707.7
2025	161,267.0	639,537.5
2030	257,653.6	1,025,960.4
Y-to-Y Change	US Dollars	Zlotys
2018-2019	13.0%	20.1%
2019-2020	29.0%	31.0%
2020-2021	2.6%	1.6%
2021-2022	8.1%	11.4%
2022-2023	20.7%	20.6%
2023-2024	17.3%	17.2%
2024-2025	14.6%	14.5%
CAGR 2025-2030	12.0%	60.4%

Source: Barnes Reports

\*2023-2024 Forecasts; 2025-2030 Projections



# Poland

**Equipment Type: Continuous mining machines, borer, ripper, auger, and drum, including roadheading machines**

## Costs and Value Added Estimates

The total cost of materials for this market in Poland will be \$62.11 million dollars in 2024 and the value added amount for the market will be \$69.27 million dollars. The cost of resales for this equipment is expected to reach \$5.45 million dollars in 2024.

<b>2024 Costs and Value Added</b>	<b>US Dollars (000s)</b>
Total cost of materials (\$1,000)	62,107.20
Cost of resales (\$1,000)	5,454.59
Cost of purchased fuels consumed (\$1,000)	196.03
Cost of purchased electricity (\$1,000)	786.36
Cost of contract work (\$1,000)	2,060.26
Value of resales (\$1,000)	7,864.54
Value added (\$1,000)	69,266.40

## Capital Expenses Estimates

The total capital expenses for this market in Poland will be \$3.34 million dollars in 2024 and the expenditures for machinery and equipment for the market will be \$2.78 million dollars. The expenditures for buildings for this equipment expected to reach \$0.56 million dollars in 2024.

<b>2024 Capital Expenses</b>	<b>US Dollars (000s)</b>
Total capital expenditures (\$1,000)	3,339.97
Capital expenditures for buildings and other structures (\$1,000)	564.08
Capital expenditures for machinery and equipment (\$1,000)	2,775.89
Capital expenditures for automobiles, trucks, etc. (\$1,000)	119.77
Capital expenditures for computers and peripheral equip. (\$1,000)	160.11
Capital expenditures for all other machinery and equip. (\$1,000)	2,496.02

\*2023-2024 Forecasts

Source: Barnes Reports



# Puerto Rico

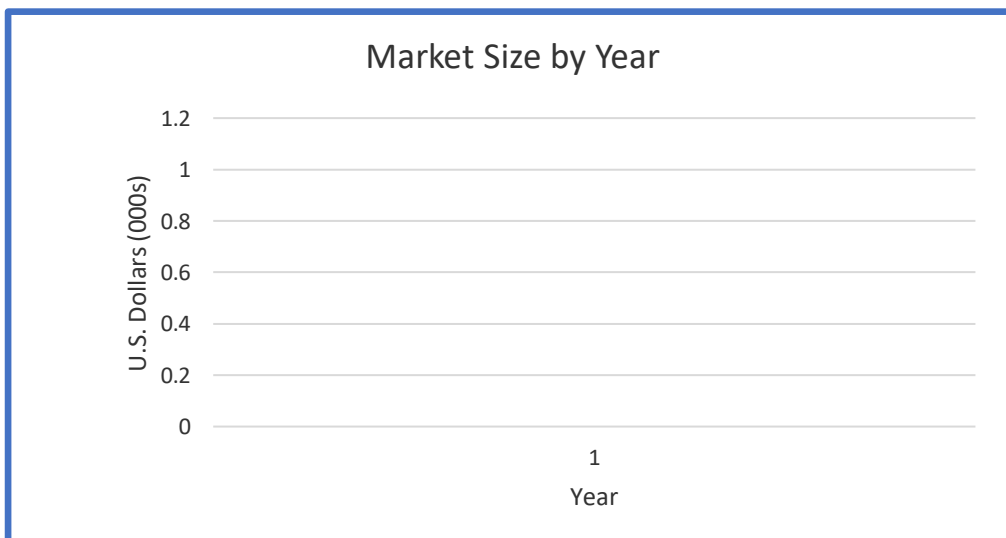
**Equipment Type: Continuous mining machines, borer, ripper, auger, and drum, including roadheading machines**

The market for this equipment in Puerto Rico is estimated to be \$54.8 million dollars in 2024 and is expected to change by 9.5 percent from 2024 to 2025. The market will be 53.2 million Dollars in 2024 and is forecast to change by 9.9 percent from 2024 to 2025.

Market Sales (000s)		
Year	US Dollars	Dollars
2018	29,813.7	29,813.7
2019	34,704.2	34,704.2
2020	46,595.2	46,595.2
2021	39,354.9	39,354.9
2022	43,308.2	42,941.2
2023	49,320.4	48,349.5
2024	54,801.3	53,157.5
2025	60,007.6	57,663.2
2030	80,494.0	73,883.0
Y-to-Y Change	US Dollars	Dollars
2018-2019	16.4%	16.4%
2019-2020	34.3%	34.3%
2020-2021	-15.5%	-15.5%
2021-2022	10.0%	9.1%
2022-2023	13.9%	12.6%
2023-2024	11.1%	9.9%
2024-2025	9.5%	8.5%
CAGR 2025-2030	6.8%	28.1%

Source: Barnes Reports

\*2023-2024 Forecasts; 2025-2030 Projections



# Puerto Rico

**Equipment Type: Continuous mining machines, borer, ripper, auger, and drum, including roadheading machines**

## Costs and Value Added Estimates

The total cost of materials for this market in Puerto Rico will be \$24.19 million dollars in 2024 and the value added amount for the market will be \$26.98 million dollars. The cost of resales for this equipment is expected to reach \$2.12 million dollars in 2024.

<b>2024 Costs and Value Added</b>	<b>US Dollars (000s)</b>
Total cost of materials (\$1,000)	24,192.87
Cost of resales (\$1,000)	2,124.75
Cost of purchased fuels consumed (\$1,000)	76.36
Cost of purchased electricity (\$1,000)	306.32
Cost of contract work (\$1,000)	802.54
Value of resales (\$1,000)	3,063.51
Value added (\$1,000)	26,981.62

## Capital Expenses Estimates

The total capital expenses for this market in Puerto Rico will be \$1.30 million dollars in 2024 and the expenditures for machinery and equipment for the market will be \$1.08 million dollars. The expenditures for buildings for this equipment expected to reach \$0.22 million dollars in 2024.

<b>2024 Capital Expenses</b>	<b>US Dollars (000s)</b>
Total capital expenditures (\$1,000)	1,301.03
Capital expenditures for buildings and other structures (\$1,000)	219.73
Capital expenditures for machinery and equipment (\$1,000)	1,081.31
Capital expenditures for automobiles, trucks, etc. (\$1,000)	46.65
Capital expenditures for computers and peripheral equip. (\$1,000)	62.37
Capital expenditures for all other machinery and equip. (\$1,000)	972.28

\*2023-2024 Forecasts

Source: Barnes Reports

# Romania

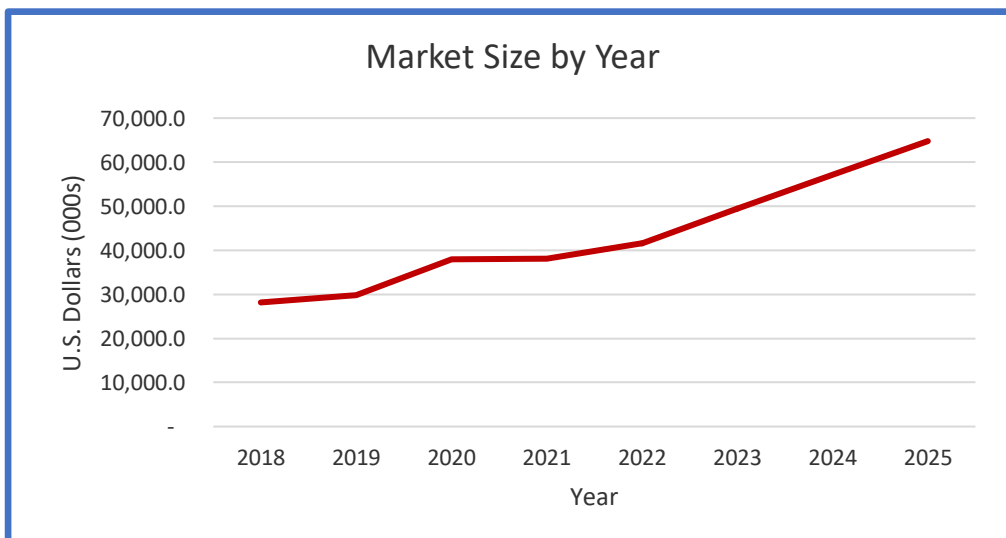
**Equipment Type: Continuous mining machines, borer, ripper, auger, and drum, including roadheading machines**

The market for this equipment in Romania is estimated to be \$57.1 million dollars in 2024 and is expected to change by 13.4 percent from 2024 to 2025. The market will be 244.9 million Leus in 2024 and is forecast to change by 15.7 percent from 2024 to 2025.

Market Sales (000s)		
Year	US Dollars	Leus
2018	28,173.9	111,050.4
2019	29,880.6	126,630.8
2020	37,997.4	161,261.0
2021	38,170.2	158,803.9
2022	41,562.2	177,468.3
2023	49,456.7	211,639.0
2024	57,108.6	244,879.6
2025	64,777.8	278,122.0
2030	97,301.6	416,553.7
Y-to-Y Change	US Dollars	Leus
2018-2019	6.1%	14.0%
2019-2020	27.2%	27.3%
2020-2021	0.5%	-1.5%
2021-2022	8.9%	11.8%
2022-2023	19.0%	19.3%
2023-2024	15.5%	15.7%
2024-2025	13.4%	13.6%
CAGR 2025-2030	10.0%	49.8%

Source: Barnes Reports

\*2023-2024 Forecasts; 2025-2030 Projections



# Romania

**Equipment Type: Continuous mining machines, borer, ripper, auger, and drum, including roadheading machines**

## Costs and Value Added Estimates

The total cost of materials for this market in Romania will be \$25.21 million dollars in 2024 and the value added amount for the market will be \$28.12 million dollars. The cost of resales for this equipment is expected to reach \$2.21 million dollars in 2024.

<b>2024 Costs and Value Added</b>	<b>US Dollars (000s)</b>
Total cost of materials (\$1,000)	25,211.46
Cost of resales (\$1,000)	2,214.21
Cost of purchased fuels consumed (\$1,000)	79.58
Cost of purchased electricity (\$1,000)	319.21
Cost of contract work (\$1,000)	836.33
Value of resales (\$1,000)	3,192.49
Value added (\$1,000)	28,117.63

## Capital Expenses Estimates

The total capital expenses for this market in Romania will be \$1.36 million dollars in 2024 and the expenditures for machinery and equipment for the market will be \$1.13 million dollars. The expenditures for buildings for this equipment expected to reach \$0.23 million dollars in 2024.

<b>2024 Capital Expenses</b>	<b>US Dollars (000s)</b>
Total capital expenditures (\$1,000)	1,355.81
Capital expenditures for buildings and other structures (\$1,000)	228.98
Capital expenditures for machinery and equipment (\$1,000)	1,126.83
Capital expenditures for automobiles, trucks, etc. (\$1,000)	48.62
Capital expenditures for computers and peripheral equip. (\$1,000)	64.99
Capital expenditures for all other machinery and equip. (\$1,000)	1,013.22

\*2023-2024 Forecasts

Source: Barnes Reports

# Russia

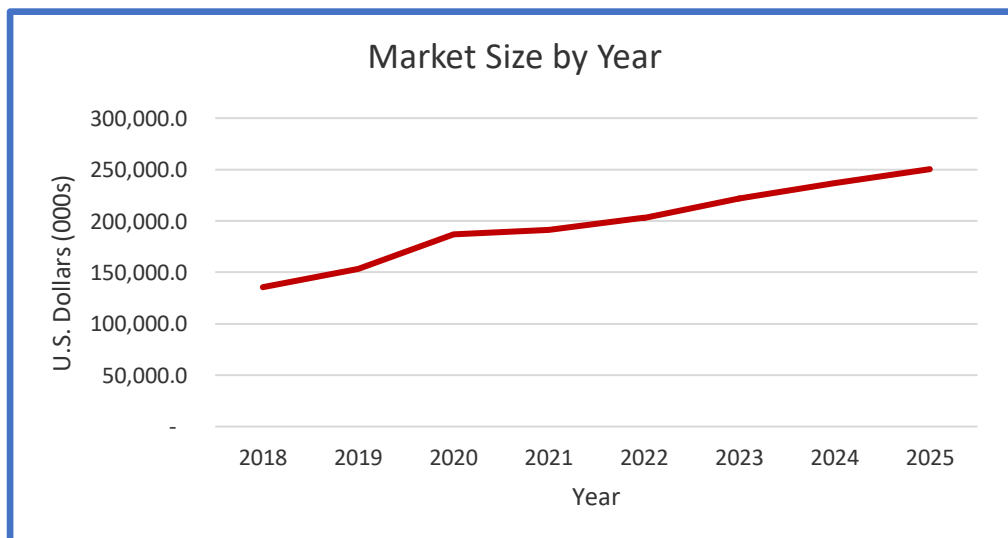
**Equipment Type: Continuous mining machines, borer, ripper, auger, and drum, including roadheading machines**

The market for this equipment in Russia is estimated to be \$237.0 million dollars in 2024 and is expected to change by 5.6 percent from 2024 to 2025. The market will be 20314.2 million Rubles in 2024 and is forecast to change by 11.2 percent from 2024 to 2025.

Market Sales (000s)		
Year	US Dollars	Rubles
2018	135,574.3	8,496,185.3
2019	153,443.9	9,933,606.0
2020	187,216.0	13,499,192.9
2021	191,238.5	14,085,541.0
2022	202,855.8	16,014,644.3
2023	221,831.3	18,274,419.5
2024	237,007.3	20,314,204.0
2025	250,346.7	22,184,182.4
2030	290,708.5	30,916,905.5
Y-to-Y Change	US Dollars	Rubles
2018-2019	13.2%	16.9%
2019-2020	22.0%	35.9%
2020-2021	2.1%	4.3%
2021-2022	6.1%	13.7%
2022-2023	9.4%	14.1%
2023-2024	6.8%	11.2%
2024-2025	5.6%	9.2%
CAGR 2025-2030	3.2%	39.4%

Source: Barnes Reports

\*2023-2024 Forecasts; 2025-2030 Projections



# Russia

**Equipment Type: Continuous mining machines, borer, ripper, auger, and drum, including roadheading machines**

## Costs and Value Added Estimates

The total cost of materials for this market in Russia will be \$104.63 million dollars in 2024 and the value added amount for the market will be \$116.69 million dollars. The cost of resales for this equipment is expected to reach \$9.19 million dollars in 2024.

<b>2024 Costs and Value Added</b>	<b>US Dollars (000s)</b>
Total cost of materials (\$1,000)	104,630.52
Cost of resales (\$1,000)	9,189.22
Cost of purchased fuels consumed (\$1,000)	330.25
Cost of purchased electricity (\$1,000)	1,324.77
Cost of contract work (\$1,000)	3,470.87
Value of resales (\$1,000)	13,249.21
Value added (\$1,000)	116,691.45

## Capital Expenses Estimates

The total capital expenses for this market in Russia will be \$5.63 million dollars in 2024 and the expenditures for machinery and equipment for the market will be \$4.68 million dollars. The expenditures for buildings for this equipment expected to reach \$0.95 million dollars in 2024.

<b>2024 Capital Expenses</b>	<b>US Dollars (000s)</b>
Total capital expenditures (\$1,000)	5,626.77
Capital expenditures for buildings and other structures (\$1,000)	950.29
Capital expenditures for machinery and equipment (\$1,000)	4,676.48
Capital expenditures for automobiles, trucks, etc. (\$1,000)	201.77
Capital expenditures for computers and peripheral equip. (\$1,000)	269.73
Capital expenditures for all other machinery and equip. (\$1,000)	4,204.99

\*2023-2024 Forecasts

Source: Barnes Reports

# Saudi Arabia

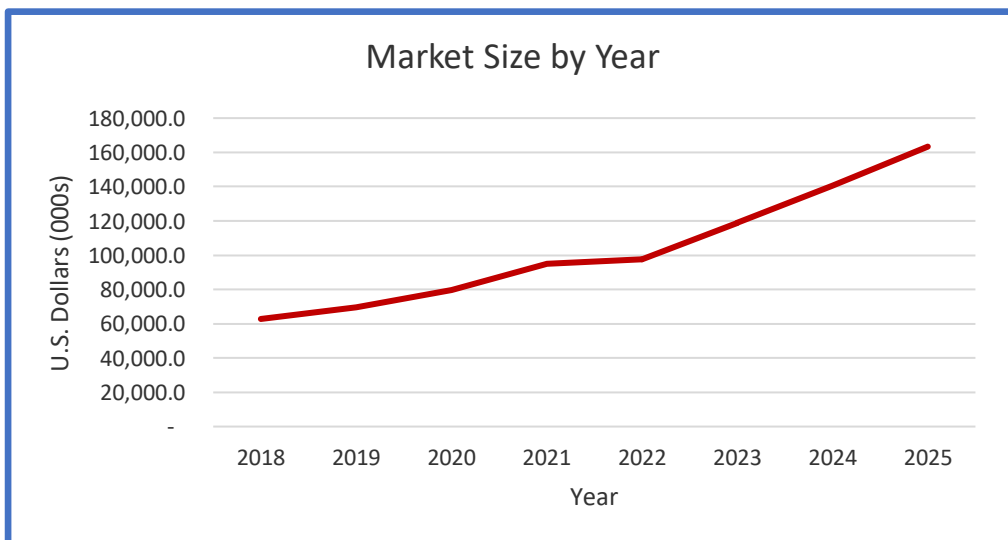
**Equipment Type: Continuous mining machines, borer, ripper, auger, and drum, including roadheading machines**

The market for this equipment in Saudi Arabia is estimated to be \$140.7 million dollars in 2024 and is expected to change by 16.1 percent from 2024 to 2025. The market will be 511.8 million Riyals in 2024 and is forecast to change by 16.7 percent from 2024 to 2025.

Market Sales (000s)		
Year	US Dollars	Riyals
2018	62,792.7	235,472.6
2019	69,601.5	261,005.8
2020	79,799.9	299,249.7
2021	95,125.6	356,721.2
2022	97,587.3	365,725.0
2023	118,797.4	438,381.1
2024	140,702.5	511,776.4
2025	163,365.5	586,677.4
2030	270,700.1	942,118.1
Y-to-Y Change	US Dollars	Riyals
2018-2019	10.8%	10.8%
2019-2020	14.7%	14.7%
2020-2021	19.2%	19.2%
2021-2022	2.6%	2.5%
2022-2023	21.7%	19.9%
2023-2024	18.4%	16.7%
2024-2025	16.1%	14.6%
CAGR 2025-2030	13.1%	60.6%

Source: Barnes Reports

\*2023-2024 Forecasts; 2025-2030 Projections



# Saudi Arabia

**Equipment Type: Continuous mining machines, borer, ripper, auger, and drum, including roadheading machines**

## Costs and Value Added Estimates

The total cost of materials for this market in Saudi Arabia will be \$62.12 million dollars in 2024 and the value added amount for the market will be \$69.28 million dollars. The cost of resales for this equipment is expected to reach \$5.46 million dollars in 2024.

<b>2024 Costs and Value Added</b>	<b>US Dollars (000s)</b>
Total cost of materials (\$1,000)	62,115.28
Cost of resales (\$1,000)	5,455.30
Cost of purchased fuels consumed (\$1,000)	196.06
Cost of purchased electricity (\$1,000)	786.47
Cost of contract work (\$1,000)	2,060.53
Value of resales (\$1,000)	7,865.56
Value added (\$1,000)	69,275.41

## Capital Expenses Estimates

The total capital expenses for this market in Saudi Arabia will be \$3.34 million dollars in 2024 and the expenditures for machinery and equipment for the market will be \$2.78 million dollars. The expenditures for buildings for this equipment expected to reach \$0.56 million dollars in 2024.

<b>2024 Capital Expenses</b>	<b>US Dollars (000s)</b>
Total capital expenditures (\$1,000)	3,340.41
Capital expenditures for buildings and other structures (\$1,000)	564.15
Capital expenditures for machinery and equipment (\$1,000)	2,776.26
Capital expenditures for automobiles, trucks, etc. (\$1,000)	119.78
Capital expenditures for computers and peripheral equip. (\$1,000)	160.13
Capital expenditures for all other machinery and equip. (\$1,000)	2,496.34

\*2023-2024 Forecasts

Source: Barnes Reports



# Singapore

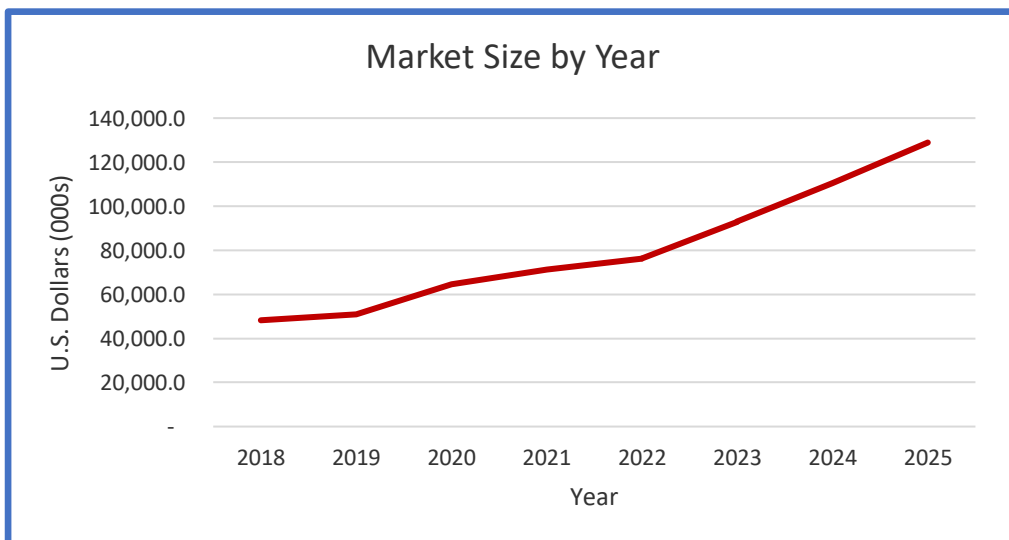
**Equipment Type: Continuous mining machines, borer, ripper, auger, and drum, including roadheading machines**

The market for this equipment in Singapore is estimated to be \$110.5 million dollars in 2024 and is expected to change by 16.6 percent from 2024 to 2025. The market will be 144.9 million Dollars in 2024 and is forecast to change by 17.1 percent from 2024 to 2025.

Market Sales (000s)		
Year	US Dollars	Dollars
2018	48,247.1	65,075.8
2019	50,980.3	69,547.3
2020	64,525.4	89,025.7
2021	71,252.1	95,726.0
2022	76,317.7	103,472.7
2023	92,911.4	123,801.3
2024	110,545.8	144,930.7
2025	128,917.4	166,622.3
2030	221,058.6	269,894.2
Y-to-Y Change	US Dollars	Dollars
2018-2019	5.7%	6.9%
2019-2020	26.6%	28.0%
2020-2021	10.4%	7.5%
2021-2022	7.1%	8.1%
2022-2023	21.7%	19.6%
2023-2024	19.0%	17.1%
2024-2025	16.6%	15.0%
CAGR 2025-2030	14.3%	62.0%

Source: Barnes Reports

\*2023-2024 Forecasts; 2025-2030 Projections



# Singapore

**Equipment Type: Continuous mining machines, borer, ripper, auger, and drum, including roadheading machines**

## Costs and Value Added Estimates

The total cost of materials for this market in Singapore will be \$48.80 million dollars in 2024 and the value added amount for the market will be \$54.43 million dollars. The cost of resales for this equipment is expected to reach \$4.29 million dollars in 2024.

<b>2024 Costs and Value Added</b>	<b>US Dollars (000s)</b>
Total cost of materials (\$1,000)	48,802.13
Cost of resales (\$1,000)	4,286.07
Cost of purchased fuels consumed (\$1,000)	154.03
Cost of purchased electricity (\$1,000)	617.90
Cost of contract work (\$1,000)	1,618.89
Value of resales (\$1,000)	6,179.74
Value added (\$1,000)	54,427.63

## Capital Expenses Estimates

The total capital expenses for this market in Singapore will be \$2.62 million dollars in 2024 and the expenditures for machinery and equipment for the market will be \$2.18 million dollars. The expenditures for buildings for this equipment expected to reach \$0.44 million dollars in 2024.

<b>2024 Capital Expenses</b>	<b>US Dollars (000s)</b>
Total capital expenditures (\$1,000)	2,624.46
Capital expenditures for buildings and other structures (\$1,000)	443.24
Capital expenditures for machinery and equipment (\$1,000)	2,181.22
Capital expenditures for automobiles, trucks, etc. (\$1,000)	94.11
Capital expenditures for computers and peripheral equip. (\$1,000)	125.81
Capital expenditures for all other machinery and equip. (\$1,000)	1,961.30

\*2023-2024 Forecasts

Source: Barnes Reports

# South Africa

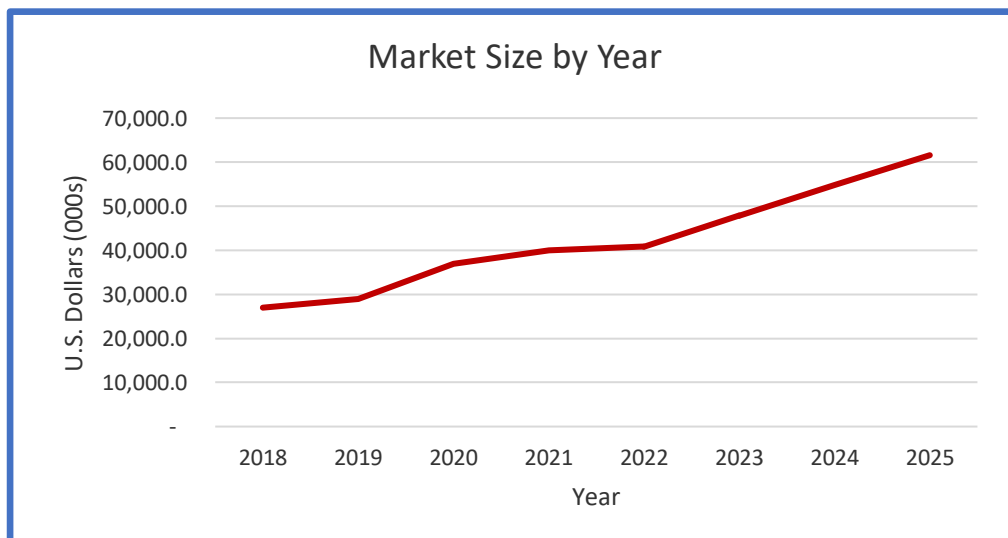
**Equipment Type: Continuous mining machines, borer, ripper, auger, and drum, including roadheading machines**

The market for this equipment in South Africa is estimated to be \$54.8 million dollars in 2024 and is expected to change by 12.4 percent from 2024 to 2025. The market will be 975.1 million Rands in 2024 and is forecast to change by 19.1 percent from 2024 to 2025.

Market Sales (000s)		
Year	US Dollars	Rands
2018	26,982.9	357,089.1
2019	28,978.2	418,688.2
2020	36,889.5	607,168.3
2021	39,943.7	590,314.9
2022	40,805.7	667,446.5
2023	47,903.7	818,470.1
2024	54,791.6	975,060.6
2025	61,580.5	1,134,244.4
2030	90,633.0	1,934,916.6
Y-to-Y Change	US Dollars	Rands
2018-2019	7.4%	17.3%
2019-2020	27.3%	45.0%
2020-2021	8.3%	-2.8%
2021-2022	2.2%	13.1%
2022-2023	17.4%	22.6%
2023-2024	14.4%	19.1%
2024-2025	12.4%	16.3%
CAGR 2025-2030	9.4%	70.6%

Source: Barnes Reports

\*2023-2024 Forecasts; 2025-2030 Projections



# South Africa

**Equipment Type: Continuous mining machines, borer, ripper, auger, and drum, including roadheading machines**

## Costs and Value Added Estimates

The total cost of materials for this market in South Africa will be \$24.19 million dollars in 2024 and the value added amount for the market will be \$26.98 million dollars. The cost of resales for this equipment is expected to reach \$2.12 million dollars in 2024.

<b>2024 Costs and Value Added</b>	<b>US Dollars (000s)</b>
Total cost of materials (\$1,000)	24,188.61
Cost of resales (\$1,000)	2,124.37
Cost of purchased fuels consumed (\$1,000)	76.35
Cost of purchased electricity (\$1,000)	306.26
Cost of contract work (\$1,000)	802.40
Value of resales (\$1,000)	3,062.97
Value added (\$1,000)	26,976.87

## Capital Expenses Estimates

The total capital expenses for this market in South Africa will be \$1.30 million dollars in 2024 and the expenditures for machinery and equipment for the market will be \$1.08 million dollars. The expenditures for buildings for this equipment expected to reach \$0.22 million dollars in 2024.

<b>2024 Capital Expenses</b>	<b>US Dollars (000s)</b>
Total capital expenditures (\$1,000)	1,300.80
Capital expenditures for buildings and other structures (\$1,000)	219.69
Capital expenditures for machinery and equipment (\$1,000)	1,081.11
Capital expenditures for automobiles, trucks, etc. (\$1,000)	46.65
Capital expenditures for computers and peripheral equip. (\$1,000)	62.36
Capital expenditures for all other machinery and equip. (\$1,000)	972.11

\*2023-2024 Forecasts

Source: Barnes Reports

# Spain

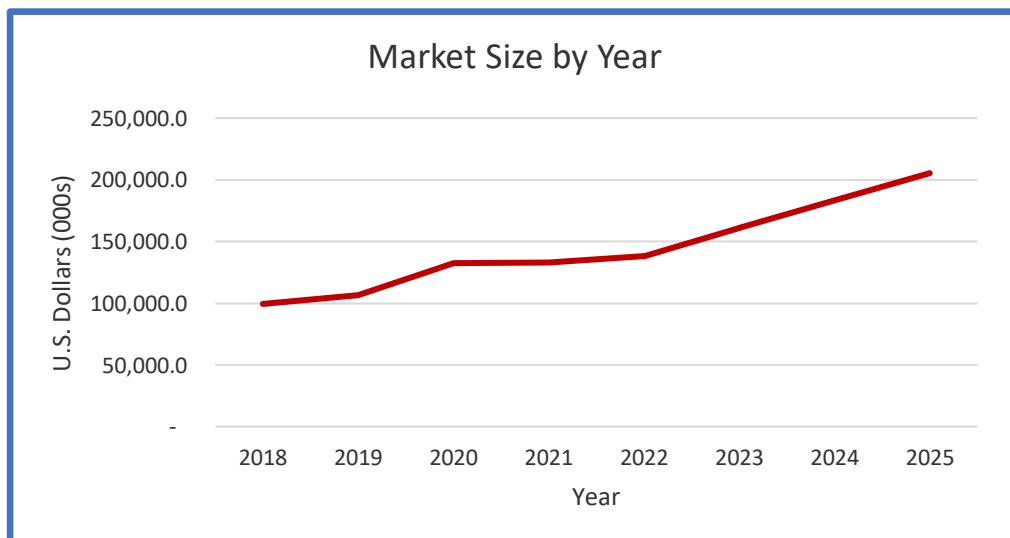
**Equipment Type: Continuous mining machines, borer, ripper, auger, and drum, including roadheading machines**

The market for this equipment in Spain is estimated to be \$183.1 million dollars in 2024 and is expected to change by 12.2 percent from 2024 to 2025. The market will be 151.7 million Euros in 2024 and is forecast to change by 12.1 percent from 2024 to 2025.

Market Sales (000s)		
Year	US Dollars	Euros
2018	99,396.3	84,166.0
2019	106,770.5	95,375.5
2020	132,328.7	115,854.7
2021	133,181.5	112,604.1
2022	137,982.6	117,946.8
2023	160,942.1	135,366.5
2024	183,141.6	151,740.8
2025	205,393.7	167,950.5
2030	302,078.6	231,756.5
Y-to-Y Change	US Dollars	Euros
2018-2019	7.4%	13.3%
2019-2020	23.9%	21.5%
2020-2021	0.6%	-2.8%
2021-2022	3.6%	4.7%
2022-2023	16.6%	14.8%
2023-2024	13.8%	12.1%
2024-2025	12.2%	10.7%
CAGR 2025-2030	9.4%	38.0%

Source: Barnes Reports

\*2023-2024 Forecasts; 2025-2030 Projections



# Spain

**Equipment Type: Continuous mining machines, borer, ripper, auger, and drum, including roadheading machines**

## Costs and Value Added Estimates

The total cost of materials for this market in Spain will be \$80.85 million dollars in 2024 and the value added amount for the market will be \$90.17 million dollars. The cost of resales for this equipment is expected to reach \$7.10 million dollars in 2024.

<b>2024 Costs and Value Added</b>	<b>US Dollars (000s)</b>
Total cost of materials (\$1,000)	80,850.65
Cost of resales (\$1,000)	7,100.74
Cost of purchased fuels consumed (\$1,000)	255.19
Cost of purchased electricity (\$1,000)	1,023.68
Cost of contract work (\$1,000)	2,682.03
Value of resales (\$1,000)	10,238.00
Value added (\$1,000)	90,170.44

## Capital Expenses Estimates

The total capital expenses for this market in Spain will be \$4.35 million dollars in 2024 and the expenditures for machinery and equipment for the market will be \$3.61 million dollars. The expenditures for buildings for this equipment expected to reach \$0.73 million dollars in 2024.

<b>2024 Capital Expenses</b>	<b>US Dollars (000s)</b>
Total capital expenditures (\$1,000)	4,347.95
Capital expenditures for buildings and other structures (\$1,000)	734.31
Capital expenditures for machinery and equipment (\$1,000)	3,613.64
Capital expenditures for automobiles, trucks, etc. (\$1,000)	155.91
Capital expenditures for computers and peripheral equip. (\$1,000)	208.42
Capital expenditures for all other machinery and equip. (\$1,000)	3,249.30

\*2023-2024 Forecasts

Source: Barnes Reports

# Sweden

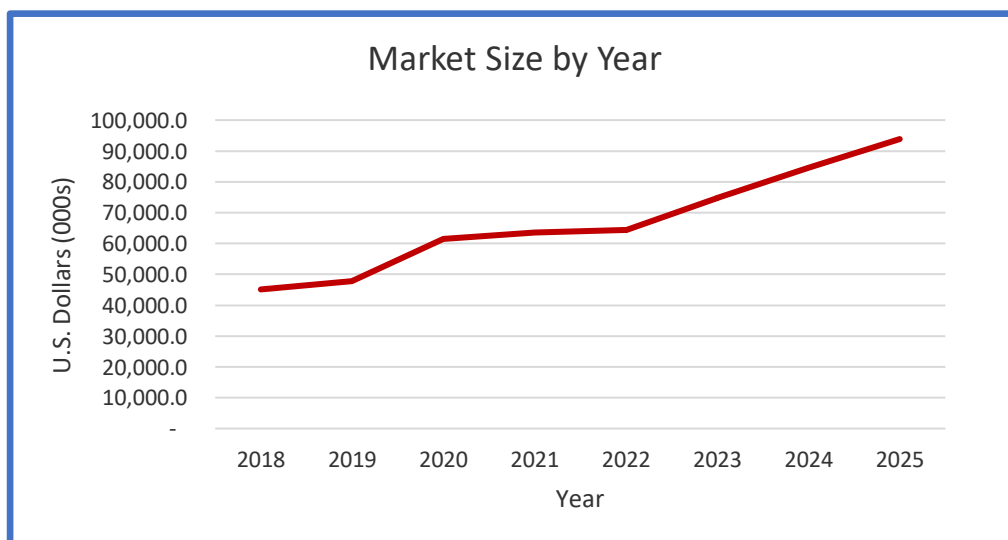
**Equipment Type: Continuous mining machines, borer, ripper, auger, and drum, including roadheading machines**

The market for this equipment in Sweden is estimated to be \$84.5 million dollars in 2024 and is expected to change by 11 percent from 2024 to 2025. The market will be 762.5 million Kronas in 2024 and is forecast to change by 12.5 percent from 2024 to 2025.

Market Sales (000s)		
Year	US Dollars	Kronas
2018	45,114.2	392,155.8
2019	47,848.5	452,567.8
2020	61,492.5	566,365.2
2021	63,556.9	545,100.2
2022	64,322.3	586,848.5
2023	74,730.1	677,802.3
2024	84,532.1	762,506.8
2025	93,849.8	842,234.9
2030	133,140.7	1,185,155.5
Y-to-Y Change	US Dollars	Kronas
2018-2019	6.1%	15.4%
2019-2020	28.5%	25.1%
2020-2021	3.4%	-3.8%
2021-2022	1.2%	7.7%
2022-2023	16.2%	15.5%
2023-2024	13.1%	12.5%
2024-2025	11.0%	10.5%
CAGR 2025-2030	8.4%	40.7%

Source: Barnes Reports

\*2023-2024 Forecasts; 2025-2030 Projections



# Sweden

**Equipment Type: Continuous mining machines, borer, ripper, auger, and drum, including roadheading machines**

## Costs and Value Added Estimates

The total cost of materials for this market in Sweden will be \$37.32 million dollars in 2024 and the value added amount for the market will be \$41.62 million dollars. The cost of resales for this equipment is expected to reach \$3.28 million dollars in 2024.

<b>2024 Costs and Value Added</b>	<b>US Dollars (000s)</b>
Total cost of materials (\$1,000)	37,317.99
Cost of resales (\$1,000)	3,277.47
Cost of purchased fuels consumed (\$1,000)	117.79
Cost of purchased electricity (\$1,000)	472.50
Cost of contract work (\$1,000)	1,237.94
Value of resales (\$1,000)	4,725.52
Value added (\$1,000)	41,619.69

## Capital Expenses Estimates

The total capital expenses for this market in Sweden will be \$2.01 million dollars in 2024 and the expenditures for machinery and equipment for the market will be \$1.67 million dollars. The expenditures for buildings for this equipment expected to reach \$0.34 million dollars in 2024.

<b>2024 Capital Expenses</b>	<b>US Dollars (000s)</b>
Total capital expenditures (\$1,000)	2,006.87
Capital expenditures for buildings and other structures (\$1,000)	338.93
Capital expenditures for machinery and equipment (\$1,000)	1,667.94
Capital expenditures for automobiles, trucks, etc. (\$1,000)	71.97
Capital expenditures for computers and peripheral equip. (\$1,000)	96.20
Capital expenditures for all other machinery and equip. (\$1,000)	1,499.77

\*2023-2024 Forecasts

Source: Barnes Reports



# Switzerland

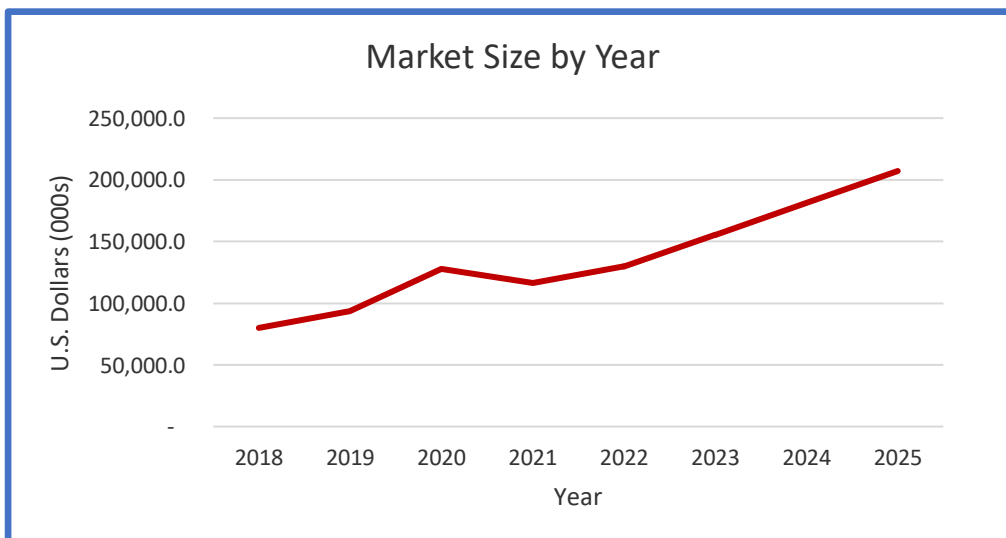
**Equipment Type: Continuous mining machines, borer, ripper, auger, and drum, including roadheading machines**

The market for this equipment in Switzerland is estimated to be \$181.3 million dollars in 2024 and is expected to change by 14.3 percent from 2024 to 2025. The market will be 152.4 million Francs in 2024 and is forecast to change by 12.2 percent from 2024 to 2025.

Market Sales (000s)		
Year	US Dollars	Francs
2018	79,975.0	78,206.2
2019	93,347.5	92,766.4
2020	127,785.6	119,970.5
2021	116,511.1	106,473.2
2022	129,705.9	118,222.5
2023	155,448.0	135,905.0
2024	181,263.4	152,437.1
2025	207,111.3	168,423.2
2030	323,914.7	233,425.1
Y-to-Y Change	US Dollars	Francs
2018-2019	16.7%	18.6%
2019-2020	36.9%	29.3%
2020-2021	-8.8%	-11.3%
2021-2022	11.3%	11.0%
2022-2023	19.8%	15.0%
2023-2024	16.6%	12.2%
2024-2025	14.3%	10.5%
CAGR 2025-2030	11.3%	38.6%

Source: Barnes Reports

\*2023-2024 Forecasts; 2025-2030 Projections



# Switzerland

**Equipment Type: Continuous mining machines, borer, ripper, auger, and drum, including roadheading machines**

## Costs and Value Added Estimates

The total cost of materials for this market in Switzerland will be \$80.02 million dollars in 2024 and the value added amount for the market will be \$89.25 million dollars. The cost of resales for this equipment is expected to reach \$7.03 million dollars in 2024.

<b>2024 Costs and Value Added</b>	<b>US Dollars (000s)</b>
Total cost of materials (\$1,000)	80,021.50
Cost of resales (\$1,000)	7,027.92
Cost of purchased fuels consumed (\$1,000)	252.57
Cost of purchased electricity (\$1,000)	1,013.18
Cost of contract work (\$1,000)	2,654.52
Value of resales (\$1,000)	10,133.00
Value added (\$1,000)	89,245.70

## Capital Expenses Estimates

The total capital expenses for this market in Switzerland will be \$4.30 million dollars in 2024 and the expenditures for machinery and equipment for the market will be \$3.58 million dollars. The expenditures for buildings for this equipment expected to reach \$0.73 million dollars in 2024.

<b>2024 Capital Expenses</b>	<b>US Dollars (000s)</b>
Total capital expenditures (\$1,000)	4,303.36
Capital expenditures for buildings and other structures (\$1,000)	726.78
Capital expenditures for machinery and equipment (\$1,000)	3,576.58
Capital expenditures for automobiles, trucks, etc. (\$1,000)	154.32
Capital expenditures for computers and peripheral equip. (\$1,000)	206.29
Capital expenditures for all other machinery and equip. (\$1,000)	3,215.98

\*2023-2024 Forecasts

Source: Barnes Reports

# Thailand

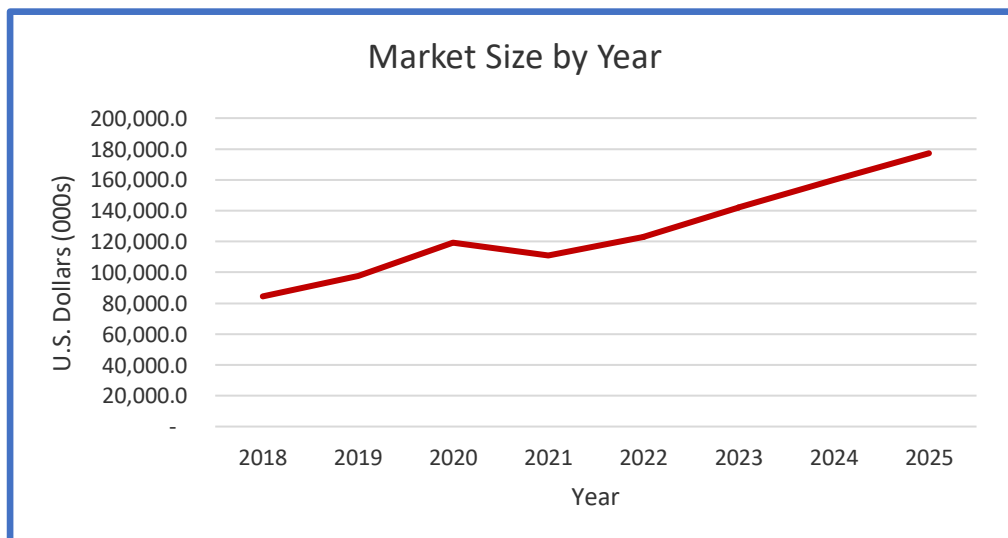
**Equipment Type: Continuous mining machines, borer, ripper, auger, and drum, including roadheading machines**

The market for this equipment in Thailand is estimated to be \$159.9 million dollars in 2024 and is expected to change by 10.8 percent from 2024 to 2025. The market will be 4680.6 million Bahts in 2024 and is forecast to change by 10.1 percent from 2024 to 2025.

Market Sales (000s)		
Year	US Dollars	Bahts
2018	84,406.9	2,727,204.0
2019	97,632.4	3,031,250.9
2020	119,275.3	3,732,566.1
2021	111,138.7	3,553,892.1
2022	122,987.7	3,769,822.3
2023	142,008.6	4,250,264.9
2024	159,895.0	4,680,558.1
2025	177,212.2	5,088,392.1
2030	250,854.6	6,602,298.0
Y-to-Y Change	US Dollars	Bahts
2018-2019	15.7%	11.1%
2019-2020	22.2%	23.1%
2020-2021	-6.8%	-4.8%
2021-2022	10.7%	6.1%
2022-2023	15.5%	12.7%
2023-2024	12.6%	10.1%
2024-2025	10.8%	8.7%
CAGR 2025-2030	8.3%	29.8%

Source: Barnes Reports

\*2023-2024 Forecasts; 2025-2030 Projections



# Thailand

**Equipment Type: Continuous mining machines, borer, ripper, auger, and drum, including roadheading machines**

## Costs and Value Added Estimates

The total cost of materials for this market in Thailand will be \$70.59 million dollars in 2024 and the value added amount for the market will be \$78.72 million dollars. The cost of resales for this equipment is expected to reach \$6.20 million dollars in 2024.

<b>2024 Costs and Value Added</b>	<b>US Dollars (000s)</b>
Total cost of materials (\$1,000)	70,588.10
Cost of resales (\$1,000)	6,199.43
Cost of purchased fuels consumed (\$1,000)	222.80
Cost of purchased electricity (\$1,000)	893.74
Cost of contract work (\$1,000)	2,341.59
Value of resales (\$1,000)	8,938.47
Value added (\$1,000)	78,724.91

## Capital Expenses Estimates

The total capital expenses for this market in Thailand will be \$3.80 million dollars in 2024 and the expenditures for machinery and equipment for the market will be \$3.15 million dollars. The expenditures for buildings for this equipment expected to reach \$0.64 million dollars in 2024.

<b>2024 Capital Expenses</b>	<b>US Dollars (000s)</b>
Total capital expenditures (\$1,000)	3,796.05
Capital expenditures for buildings and other structures (\$1,000)	641.10
Capital expenditures for machinery and equipment (\$1,000)	3,154.95
Capital expenditures for automobiles, trucks, etc. (\$1,000)	136.12
Capital expenditures for computers and peripheral equip. (\$1,000)	181.97
Capital expenditures for all other machinery and equip. (\$1,000)	2,836.86

\*2023-2024 Forecasts

Source: Barnes Reports

# Turkey

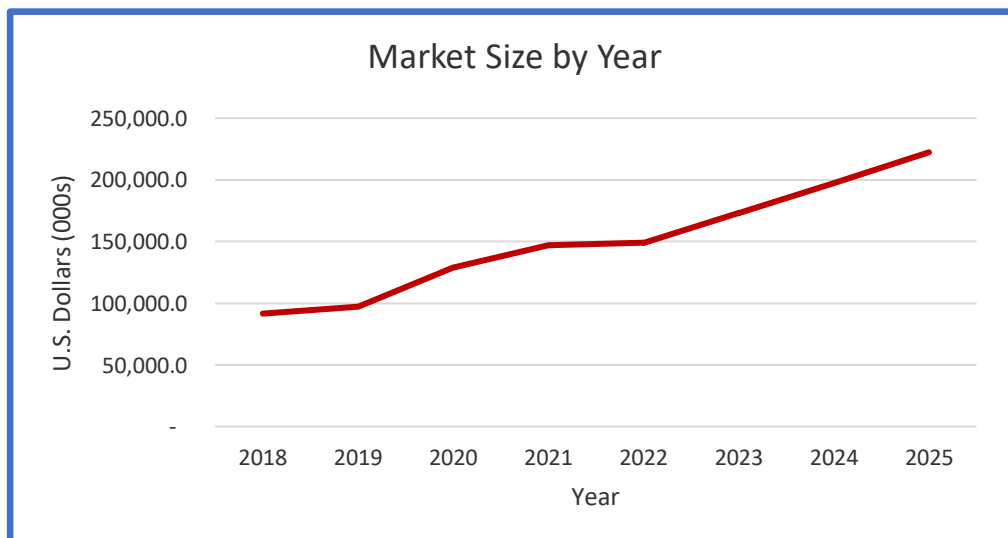
**Equipment Type: Continuous mining machines, borer, ripper, auger, and drum, including roadheading machines**

The market for this equipment in Turkey is estimated to be \$197.4 million dollars in 2024 and is expected to change by 12.6 percent from 2024 to 2025. The market will be 2526.7 million Liras in 2024 and is forecast to change by 26.8 percent from 2024 to 2025.

Market Sales (000s)		
Year	US Dollars	Liras
2018	91,568.0	442,127.1
2019	97,418.1	552,731.0
2020	128,958.6	903,999.5
2021	147,123.0	1,302,098.6
2022	148,798.0	1,529,363.0
2023	173,122.3	1,993,051.0
2024	197,431.4	2,526,665.6
2025	222,285.7	3,112,804.7
2030	336,124.3	6,664,052.8
Y-to-Y Change	US Dollars	Liras
2018-2019	6.4%	25.0%
2019-2020	32.4%	63.6%
2020-2021	14.1%	44.0%
2021-2022	1.1%	17.5%
2022-2023	16.3%	30.3%
2023-2024	14.0%	26.8%
2024-2025	12.6%	23.2%
CAGR 2025-2030	10.2%	114.1%

Source: Barnes Reports

\*2023-2024 Forecasts; 2025-2030 Projections



# Turkey

**Equipment Type: Continuous mining machines, borer, ripper, auger, and drum, including roadheading machines**

## Costs and Value Added Estimates

The total cost of materials for this market in Turkey will be \$87.16 million dollars in 2024 and the value added amount for the market will be \$97.21 million dollars. The cost of resales for this equipment is expected to reach \$7.65 million dollars in 2024.

<b>2024 Costs and Value Added</b>	<b>US Dollars (000s)</b>
Total cost of materials (\$1,000)	87,159.10
Cost of resales (\$1,000)	7,654.78
Cost of purchased fuels consumed (\$1,000)	275.10
Cost of purchased electricity (\$1,000)	1,103.56
Cost of contract work (\$1,000)	2,891.30
Value of resales (\$1,000)	11,036.83
Value added (\$1,000)	97,206.07

## Capital Expenses Estimates

The total capital expenses for this market in Turkey will be \$4.69 million dollars in 2024 and the expenditures for machinery and equipment for the market will be \$3.90 million dollars. The expenditures for buildings for this equipment expected to reach \$0.79 million dollars in 2024.

<b>2024 Capital Expenses</b>	<b>US Dollars (000s)</b>
Total capital expenditures (\$1,000)	4,687.20
Capital expenditures for buildings and other structures (\$1,000)	791.61
Capital expenditures for machinery and equipment (\$1,000)	3,895.59
Capital expenditures for automobiles, trucks, etc. (\$1,000)	168.08
Capital expenditures for computers and peripheral equip. (\$1,000)	224.69
Capital expenditures for all other machinery and equip. (\$1,000)	3,502.83

\*2023-2024 Forecasts

Source: Barnes Reports

# United Arab Emirates

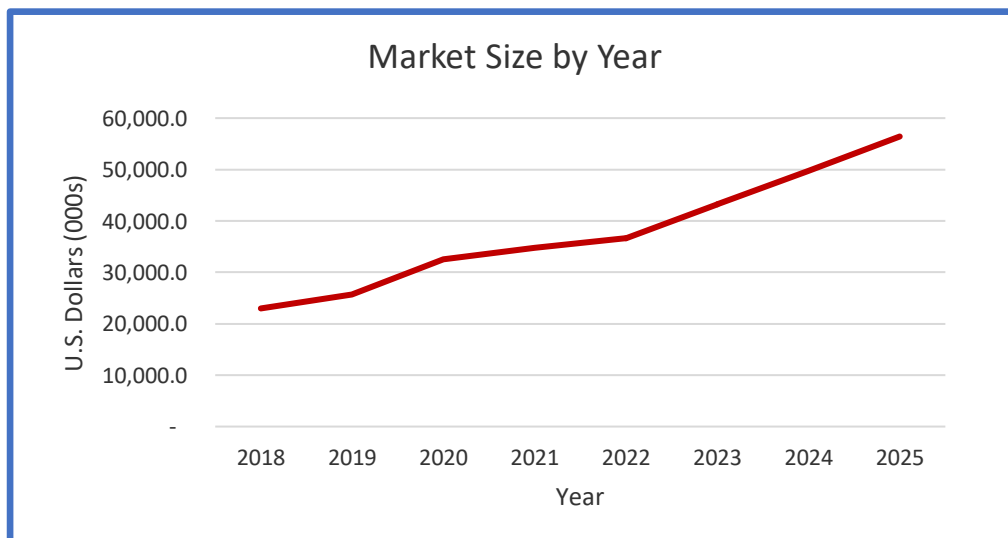
**Equipment Type: Continuous mining machines, borer, ripper, auger, and drum, including roadheading machines**

The market for this equipment in United Arab Emirates is estimated to be \$49.7 million dollars in 2024 and is expected to change by 13.4 percent from 2024 to 2025. The market will be 181.9 million Dirhams in 2024 and is forecast to change by 14.4 percent from 2024 to 2025.

Market Sales (000s)		
Year	US Dollars	Dirhams
2018	22,982.3	84,402.4
2019	25,707.1	94,409.2
2020	32,543.8	119,517.0
2021	34,806.1	127,825.3
2022	36,615.7	135,689.4
2023	43,215.4	159,042.5
2024	49,736.1	181,868.7
2025	56,422.4	205,113.9
2030	87,654.5	307,861.4
Y-to-Y Change	US Dollars	Dirhams
2018-2019	11.9%	11.9%
2019-2020	26.6%	26.6%
2020-2021	7.0%	7.0%
2021-2022	5.2%	6.2%
2022-2023	18.0%	17.2%
2023-2024	15.1%	14.4%
2024-2025	13.4%	12.8%
CAGR 2025-2030	11.1%	50.1%

Source: Barnes Reports

\*2023-2024 Forecasts; 2025-2030 Projections



# United Arab Emirates

**Equipment Type: Continuous mining machines, borer, ripper, auger, and drum, including roadheading machines**

## Costs and Value Added Estimates

The total cost of materials for this market in United Arab Emirates will be \$21.96 million dollars in 2024 and the value added amount for the market will be \$24.49 million dollars. The cost of resales for this equipment is expected to reach \$1.93 million dollars in 2024.

<b>2024 Costs and Value Added</b>	<b>US Dollars (000s)</b>
Total cost of materials (\$1,000)	21,956.77
Cost of resales (\$1,000)	1,928.36
Cost of purchased fuels consumed (\$1,000)	69.30
Cost of purchased electricity (\$1,000)	278.00
Cost of contract work (\$1,000)	728.36
Value of resales (\$1,000)	2,780.35
Value added (\$1,000)	24,487.76

## Capital Expenses Estimates

The total capital expenses for this market in United Arab Emirates will be \$1.18 million dollars in 2024 and the expenditures for machinery and equipment for the market will be \$0.98 million dollars. The expenditures for buildings for this equipment expected to reach \$0.20 million dollars in 2024.

<b>2024 Capital Expenses</b>	<b>US Dollars (000s)</b>
Total capital expenditures (\$1,000)	1,180.78
Capital expenditures for buildings and other structures (\$1,000)	199.42
Capital expenditures for machinery and equipment (\$1,000)	981.36
Capital expenditures for automobiles, trucks, etc. (\$1,000)	42.34
Capital expenditures for computers and peripheral equip. (\$1,000)	56.60
Capital expenditures for all other machinery and equip. (\$1,000)	882.42

\*2023-2024 Forecasts

Source: Barnes Reports



# United Kingdom

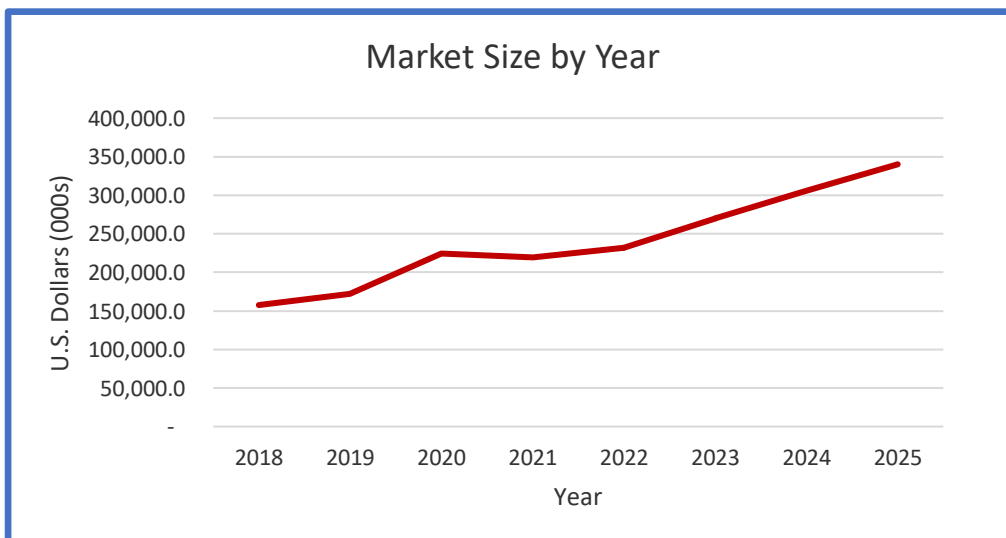
**Equipment Type: Continuous mining machines, borer, ripper, auger, and drum, including roadheading machines**

The market for this equipment in United Kingdom is estimated to be \$305.7 million dollars in 2024 and is expected to change by 11.3 percent from 2024 to 2025. The market will be 215.4 million Pounds in 2024 and is forecast to change by 10.8 percent from 2024 to 2025.

Market Sales (000s)		
Year	US Dollars	Pounds
2018	157,602.2	118,135.7
2019	172,014.2	134,763.7
2020	224,554.0	175,152.0
2021	219,583.1	159,651.1
2022	231,909.6	171,288.9
2023	269,768.2	194,485.0
2024	305,651.0	215,438.6
2025	340,120.2	235,069.9
2030	494,836.2	316,562.1
Y-to-Y Change	US Dollars	Pounds
2018-2019	9.1%	14.1%
2019-2020	30.5%	30.0%
2020-2021	-2.2%	-8.8%
2021-2022	5.6%	7.3%
2022-2023	16.3%	13.5%
2023-2024	13.3%	10.8%
2024-2025	11.3%	9.1%
CAGR 2025-2030	9.1%	34.7%

Source: Barnes Reports

\*2023-2024 Forecasts; 2025-2030 Projections



# United Kingdom

**Equipment Type: Continuous mining machines, borer, ripper, auger, and drum, including roadheading machines**

## Costs and Value Added Estimates

The total cost of materials for this market in United Kingdom will be \$134.93 million dollars in 2024 and the value added amount for the market will be \$150.49 million dollars. The cost of resales for this equipment is expected to reach \$11.85 million dollars in 2024.

<b>2024 Costs and Value Added</b>	<b>US Dollars (000s)</b>
Total cost of materials (\$1,000)	134,934.31
Cost of resales (\$1,000)	11,850.66
Cost of purchased fuels consumed (\$1,000)	425.89
Cost of purchased electricity (\$1,000)	1,708.46
Cost of contract work (\$1,000)	4,476.12
Value of resales (\$1,000)	17,086.53
Value added (\$1,000)	150,488.40

## Capital Expenses Estimates

The total capital expenses for this market in United Kingdom will be \$7.26 million dollars in 2024 and the expenditures for machinery and equipment for the market will be \$6.03 million dollars. The expenditures for buildings for this equipment expected to reach \$1.23 million dollars in 2024.

<b>2024 Capital Expenses</b>	<b>US Dollars (000s)</b>
Total capital expenditures (\$1,000)	7,256.43
Capital expenditures for buildings and other structures (\$1,000)	1,225.52
Capital expenditures for machinery and equipment (\$1,000)	6,030.92
Capital expenditures for automobiles, trucks, etc. (\$1,000)	260.21
Capital expenditures for computers and peripheral equip. (\$1,000)	347.85
Capital expenditures for all other machinery and equip. (\$1,000)	5,422.86

\*2023-2024 Forecasts

Source: Barnes Reports

# United States

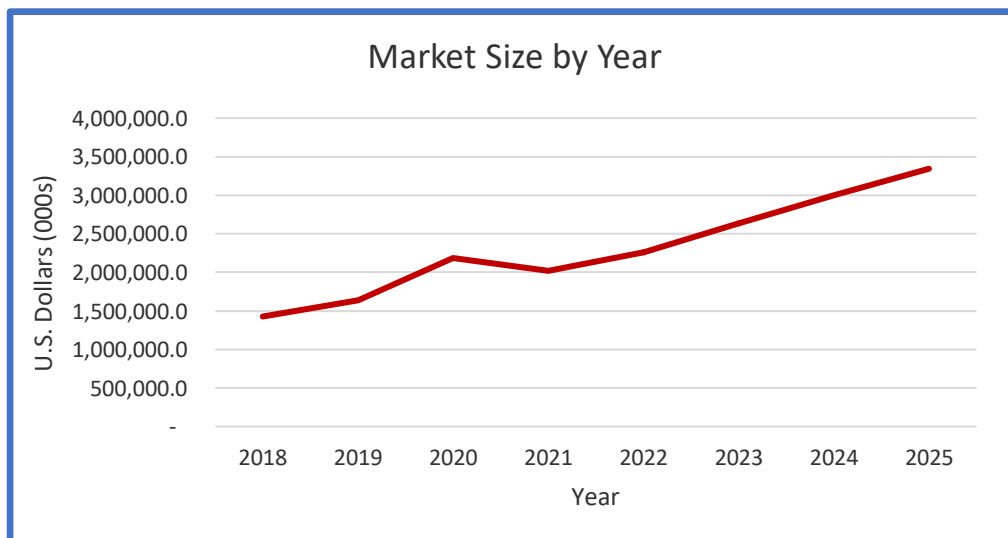
**Equipment Type: Continuous mining machines, borer, ripper, auger, and drum, including roadheading machines**

The market for this equipment in United States is estimated to be \$2,995.1 million dollars in 2024 and is expected to change by 11.6 percent from 2024 to 2025. The market will be 2995.1 million Dollars in 2024 and is forecast to change by 13.7 percent from 2024 to 2025.

Market Sales (000s)		
Year	US Dollars	Dollars
2018	1,427,100.0	1,427,100.0
2019	1,639,170.0	1,639,170.0
2020	2,189,010.0	2,189,010.0
2021	2,019,850.0	2,019,850.0
2022	2,258,410.0	2,258,410.0
2023	2,635,240.0	2,635,240.0
2024	2,995,080.0	2,995,080.0
2025	3,343,190.0	3,343,190.0
2030	4,936,680.0	4,936,680.0
Y-to-Y Change	US Dollars	Dollars
2018-2019	14.9%	14.9%
2019-2020	33.5%	33.5%
2020-2021	-7.7%	-7.7%
2021-2022	11.8%	11.8%
2022-2023	16.7%	16.7%
2023-2024	13.7%	13.7%
2024-2025	11.6%	11.6%
CAGR 2025-2030	9.5%	47.7%

Source: Barnes Reports

\*2023-2024 Forecasts; 2025-2030 Projections



# United States

**Equipment Type: Continuous mining machines, borer, ripper, auger, and drum, including roadheading machines**

## Costs and Value Added Estimates

The total cost of materials for this market in United States will be \$1,322.22 million dollars in 2024 and the value added amount for the market will be \$1,474.64 million dollars. The cost of resales for this equipment is expected to reach \$116.12 million dollars in 2024.

<b>2024 Costs and Value Added</b>	<b>US Dollars (000s)</b>
Total cost of materials (\$1,000)	1,322,223.89
Cost of resales (\$1,000)	116,124.84
Cost of purchased fuels consumed (\$1,000)	4,173.35
Cost of purchased electricity (\$1,000)	16,741.20
Cost of contract work (\$1,000)	43,861.63
Value of resales (\$1,000)	167,431.23
Value added (\$1,000)	1,474,638.79

## Capital Expenses Estimates

The total capital expenses for this market in United States will be \$71.11 million dollars in 2024 and the expenditures for machinery and equipment for the market will be \$59.10 million dollars. The expenditures for buildings for this equipment expected to reach \$12.01 million dollars in 2024.

<b>2024 Capital Expenses</b>	<b>US Dollars (000s)</b>
Total capital expenditures (\$1,000)	71,105.94
Capital expenditures for buildings and other structures (\$1,000)	12,008.87
Capital expenditures for machinery and equipment (\$1,000)	59,097.07
Capital expenditures for automobiles, trucks, etc. (\$1,000)	2,549.81
Capital expenditures for computers and peripheral equip. (\$1,000)	3,408.54
Capital expenditures for all other machinery and equip. (\$1,000)	53,138.72

\*2023-2024 Forecasts

Source: Barnes Reports

# Venezuela

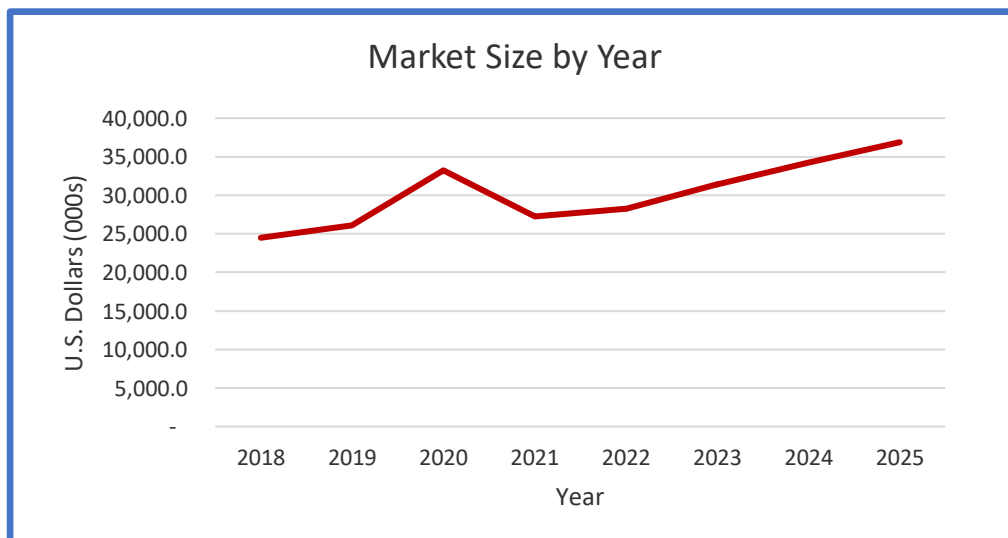
**Equipment Type: Continuous mining machines, borer, ripper, auger, and drum, including roadheading machines**

The market for this equipment in Venezuela is estimated to be \$34.2 million dollars in 2024 and is expected to change by 7.8 percent from 2024 to 2025. The market will be 280.6 million Bolivars in 2024 and is forecast to change by 14.8 percent from 2024 to 2025.

Market Sales (000s)		
Year	US Dollars	Bolivars
2018	24,487.0	127,949.9
2019	26,124.9	150,021.3
2020	33,204.7	195,660.8
2021	27,246.7	188,588.2
2022	28,231.4	207,523.5
2023	31,416.0	244,502.9
2024	34,210.0	280,603.2
2025	36,874.4	316,009.0
2030	48,168.9	490,687.8
Y-to-Y Change	US Dollars	Bolivars
2018-2019	6.7%	17.2%
2019-2020	27.1%	30.4%
2020-2021	-17.9%	-3.6%
2021-2022	3.6%	10.0%
2022-2023	11.3%	17.8%
2023-2024	8.9%	14.8%
2024-2025	7.8%	12.6%
CAGR 2025-2030	6.1%	55.3%

Source: Barnes Reports

\*2023-2024 Forecasts; 2025-2030 Projections



# Venezuela

**Equipment Type: Continuous mining machines, borer, ripper, auger, and drum, including roadheading machines**

## Costs and Value Added Estimates

The total cost of materials for this market in Venezuela will be \$15.10 million dollars in 2024 and the value added amount for the market will be \$16.84 million dollars. The cost of resales for this equipment is expected to reach \$1.33 million dollars in 2024.

<b>2024 Costs and Value Added</b>	<b>US Dollars (000s)</b>
Total cost of materials (\$1,000)	15,102.55
Cost of resales (\$1,000)	1,326.39
Cost of purchased fuels consumed (\$1,000)	47.67
Cost of purchased electricity (\$1,000)	191.22
Cost of contract work (\$1,000)	500.99
Value of resales (\$1,000)	1,912.41
Value added (\$1,000)	16,843.44

## Capital Expenses Estimates

The total capital expenses for this market in Venezuela will be \$0.81 million dollars in 2024 and the expenditures for machinery and equipment for the market will be \$0.68 million dollars. The expenditures for buildings for this equipment expected to reach \$0.14 million dollars in 2024.

<b>2024 Capital Expenses</b>	<b>US Dollars (000s)</b>
Total capital expenditures (\$1,000)	812.18
Capital expenditures for buildings and other structures (\$1,000)	137.17
Capital expenditures for machinery and equipment (\$1,000)	675.01
Capital expenditures for automobiles, trucks, etc. (\$1,000)	29.12
Capital expenditures for computers and peripheral equip. (\$1,000)	38.93
Capital expenditures for all other machinery and equip. (\$1,000)	606.95

\*2023-2024 Forecasts

Source: Barnes Reports

# Vietnam

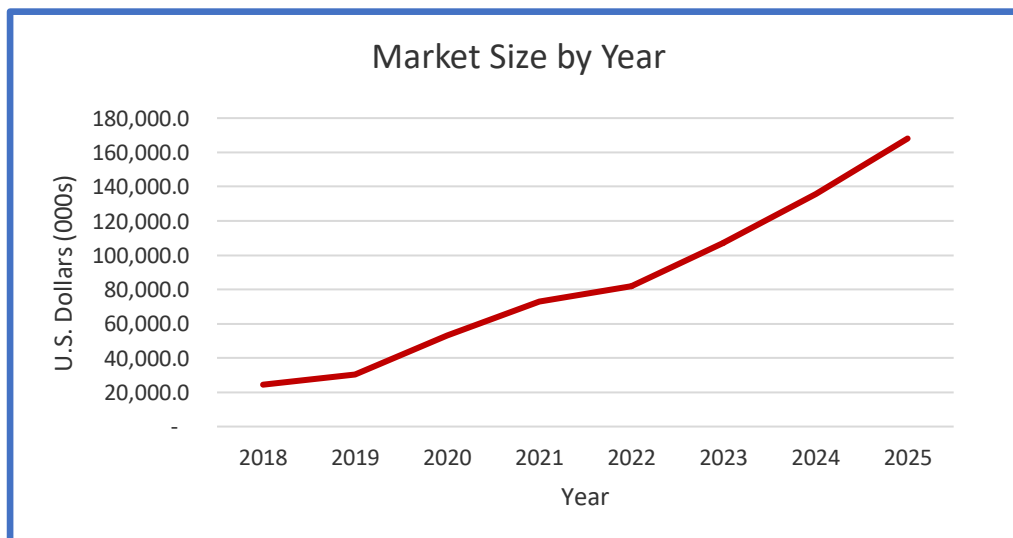
**Equipment Type: Continuous mining machines, borer, ripper, auger, and drum, including roadheading machines**

The market for this equipment in Vietnam is estimated to be \$135.9 million dollars in 2024 and is expected to change by 23.7 percent from 2024 to 2025. The market will be 3214028.2 million Dongs in 2024 and is forecast to change by 26.8 percent from 2024 to 2025.

Market Sales (000s)		
Year	US Dollars	Dongs
2018	24,447.9	552,572,432.6
2019	30,218.2	696,535,832.8
2020	52,981.1	1,229,604,001.3
2021	72,906.2	1,688,492,688.6
2022	81,912.7	1,936,252,474.3
2023	107,206.6	2,535,074,882.0
2024	135,875.8	3,214,028,157.1
2025	168,101.3	3,975,524,828.9
2030	358,103.7	8,596,494,064.3
Y-to-Y Change	US Dollars	Dongs
2018-2019	23.6%	26.1%
2019-2020	75.3%	76.5%
2020-2021	37.6%	37.3%
2021-2022	12.4%	14.7%
2022-2023	30.9%	30.9%
2023-2024	26.7%	26.8%
2024-2025	23.7%	23.7%
CAGR 2025-2030	22.6%	116.2%

Source: Barnes Reports

\*2023-2024 Forecasts; 2025-2030 Projections



# Vietnam

**Equipment Type: Continuous mining machines, borer, ripper, auger, and drum, including roadheading machines**

## Costs and Value Added Estimates

The total cost of materials for this market in Vietnam will be \$59.98 million dollars in 2024 and the value added amount for the market will be \$66.90 million dollars. The cost of resales for this equipment is expected to reach \$5.27 million dollars in 2024.

<b>2024 Costs and Value Added</b>	<b>US Dollars (000s)</b>
Total cost of materials (\$1,000)	59,984.47
Cost of resales (\$1,000)	5,268.16
Cost of purchased fuels consumed (\$1,000)	189.33
Cost of purchased electricity (\$1,000)	759.49
Cost of contract work (\$1,000)	1,989.84
Value of resales (\$1,000)	7,595.74
Value added (\$1,000)	66,898.98

## Capital Expenses Estimates

The total capital expenses for this market in Vietnam will be \$3.23 million dollars in 2024 and the expenditures for machinery and equipment for the market will be \$2.68 million dollars. The expenditures for buildings for this equipment expected to reach \$0.54 million dollars in 2024.

<b>2024 Capital Expenses</b>	<b>US Dollars (000s)</b>
Total capital expenditures (\$1,000)	3,225.82
Capital expenditures for buildings and other structures (\$1,000)	544.80
Capital expenditures for machinery and equipment (\$1,000)	2,681.02
Capital expenditures for automobiles, trucks, etc. (\$1,000)	115.68
Capital expenditures for computers and peripheral equip. (\$1,000)	154.63
Capital expenditures for all other machinery and equip. (\$1,000)	2,410.71

\*2023-2024 Forecasts

Source: Barnes Reports



# Appendix

## ***Equipment Type: Continuous mining machines, borer, ripper, auger, and drum, including roadheading machines***

### **Number of Establishments**

#### **General Definition**

An establishment is a single physical location at which business is conducted and/or services are provided. It is not necessarily identical with a company or enterprise, which may consist of one establishment or more. Economic census figures represent a summary of reports for individual establishments rather than companies. For cases where a census report was received, separate information was obtained for each location where business was conducted. When administrative records of other Federal agencies were used instead of a census report, no information was available on the number of locations operated. Each economic census establishment was tabulated according to the physical location at which the business was conducted.

When two activities or more were carried on at a single location under a single ownership, all activities generally were grouped together as a single establishment. The entire establishment was classified on the basis of its major activity and all data for it were included in that classification. However, when distinct and separate economic activities (for which different industry classification codes were appropriate) were conducted at a single location under a single ownership, separate establishment reports for each of the different activities were obtained in the census.

#### **Sector-Specific Information**

**Construction sector.** Establishments are defined as a relatively permanent office or other place of business where the usual business activities related to construction are conducted. Establishments do not represent each project or construction site. Includes all establishments that were in business at any time during the year. It covers all full-year and part-year operations. Construction establishments which were inactive or idle for the entire year were not included. Establishments are based on a survey which included all large employers and a sample of the smaller ones.

**Information; Professional, Scientific, and Technical Services; Administrative and Support and Waste Management and Remediation Services; Educational Services; Health Care and Social Assistance; Arts, Entertainment, and Recreation; and Other Services (Except Public Administration) sectors.** An establishment is included in the census if it is an employer, the establishment has \$1,000 in payroll, and was in operation at any time during 1997. Leased service departments (separately owned businesses operated as departments or concessions of other service establishments or of retail businesses, such as a separately owned shoeshine parlor in a barber shop, or a beauty shop in a department store) are treated as separate service establishments for census purposes. Leased retail departments located in service establishments (e.g., a gift shop located in a hotel) are considered separate retail establishments.

**Manufacturing sector.** Includes all manufacturing establishments (plants) with one employee or more and establishments in operation at any time during the year.

**Mining sector.** Includes all mineral establishments with one employee or more and establishments in operation at any time during the year. Establishments in the crude petroleum and natural gas and support activities for mining represent statewide operations rather than those at a single physical location.

**Real Estate and Rental and Leasing sector.** Data for individual properties leased or managed by property lessors or property managers are not normally considered separate establishments, but rather the permanent offices from which the properties are leased or managed are considered establishments. Data for separate automotive rental offices or concessions (e.g., airport locations) in the same metropolitan area for which a common fleet of cars is maintained are merged together and not considered as separate establishments.

**Retail Trade sector.** Leased departments are treated as separate establishments and are classified according to the kind of business they conduct. For example, a leased department selling shoes within a department store would be considered a separate retail establishment under the "shoe stores" classification.

**Accommodation and Foodservices sector.** Leased departments are treated as separate establishments and are classified according to the kind of business they conduct. For example, a leased department selling gifts/souvenirs within a hotel would be considered a separate retail establishment under the "gift, novelty, and souvenir stores" classification.

# Appendix

**Auxiliaries sector.** In the Standard Industrial Classification (SIC) system, auxiliary establishments (i.e., those establishments primarily serving other establishments of the same enterprise) were classified in the industry of the establishments served. In the North American Industry Classification System (NAICS), auxiliary establishments are classified according to the services performed rather than the industry served.

## Sales, Shipments, Receipts, Revenue, or Business Done

### General Definition

Includes the total sales, shipments, receipts, revenue, or business done by establishments within the scope of the economic census. The definition of each of these items is included in the information provided below.

### Sector-Specific Information

**Construction sector** - Includes the value of construction work and other business receipts for work done by establishments during the year. Included is new construction, additions and alterations or reconstruction, and maintenance and repair construction work. Also included is the value of any construction work done by the reporting establishments for themselves.

Speculative builders were instructed to include the value of buildings and other structures built or being built for sale in the current year but not sold. They were to include the costs of such construction plus normal profit. Also included is the cost of construction work done on buildings for rent or lease.

Establishments engaged in the sale and installation of such construction components as plumbing, heating, and central air-conditioning supplies and Material; lumber and building materials; paint, glass, and wallpaper; electrical and wiring supplies; and elevators or escalators were instructed to include both the value for the installation and the receipts covering the price of the items installed.

Excluded was the cost of industrial and other specialized machinery and Material, which are not an integral part of a structure.

**Finance and Insurance sector** - Includes revenue from all business activities whether or not payment was received in the census year, including commissions and fees from all sources, rents, net investment income, interest, dividends, royalties, and net insurance premiums earned. Revenue from leasing property marketed under operating leases is included, as well as interest earned from property marketed in the census year under capital, finance, or full payout leases. Revenue also includes the total value of service contracts and amounts received for work subcontracted to others.

Revenue does not include sales and other taxes collected from customers and remitted directly by the firm to a local, state, or Federal tax agency.

**Information sector** - Includes receipts from customers or clients for services rendered, from the use of facilities, and from merchandise sold, whether or not payment was received. Receipts include royalties, license fees, and other payments from the marketing of intangible products (e.g., licensing the use of or granting reproduction rights for software, musical compositions, and other intellectual property). Receipts also include the rental and leasing of vehicles, Material, instruments, tools, etc.; total value of service contracts; market value of compensation received in lieu of cash; amounts received for work subcontracted to others; dues and assessments for members and affiliates; this establishment's share of receipts from departments, concessions, and vending and amusement machines operated by others. Receipts from services provided to foreign customers from U.S. locations, including services preformed for foreign parent firms, subsidiaries, and branches are included. For public broadcast stations and libraries, include receipts from contributions, gifts, grants, and income from interest, rental of real estate, and dividends.

Receipts DO NOT include sales and other taxes collected directly from customers or clients and paid directly to a local, state, or Federal tax agency. Also excluded are gross receipts collected on behalf of others; gross receipts or departments or concessions operated by others; sales of used Material previously rented or leased to customers; proceeds from the sale of real estate (land and buildings), investments, or other assets (except inventory held for resale); contributions, gifts, grants, and income from interest, rental of real estate, and dividends EXCEPT for public broadcast stations and libraries; domestic intracompany transfers; receipts of foreign subsidiaries; and other nonoperating income.

**Management of Companies and Enterprises sector**- For holding companies, revenue includes revenue of only the holding company establishment, including net investment income, interest, and dividends.

**Manufacturing sector** - Covers the received or receivable net selling values, f.o.b. plant (exclusive of freight and taxes), of all products shipped, both primary and secondary, as well as all miscellaneous receipts, such as receipts for contract work performed for others, installation and repair, sales of scrap, and sales of products bought and resold without further processing. Included are all items made by or for the

# Appendix

establishments from materials owned by it, whether sold, transferred to other plants of the same company, or shipped on consignment. The net selling value of products made in one plant on a contract basis from materials owned by another was reported by the plant providing the materials.

In the case of multiunit companies, the manufacturer was requested to report the value of products transferred to other establishments of the same company at full economic or commercial value, including not only the direct cost of production but also a reasonable proportion of "all other costs" (including company overhead) and profit.

**Mining sector** - Includes the net selling values, f.o.b. mine or plant after discounts and allowances, excluding freight charges and excise taxes. Shipments includes all products physically shipped from the establishment during the year, including material withdrawn from stockpiles and products shipped on consignment, whether or not sold in the current year. Prepared material or concentrates includes preparation from ores mined at the same establishment, purchased, received from other operations of the same company, or received for milling on a custom or toll basis. For products transferred to other establishments of the same company or prepared on a custom basis, companies were requested to report the estimated value, not merely the cost of producing the items. Multiestablishment companies were asked to report value information for each establishment as if it were a separate economic unit. They were instructed to report the value of all products transferred to other plants of the company at their full economic value; to include, in addition to direct cost of production, a reasonable proportion of company overhead and profits. For all establishments classified in an industry, value of shipments and receipts includes (1) the value of all primary products of the industry; (2) the value of secondary products which are primary to other industries; (3) the receipts for contract work done for others, except custom milling; and (4) the value of products purchased and resold without further processing. Receipts for custom milling are not included to avoid duplication with the value of custom milled ores included in an industry's primary and secondary products. Some duplication exists in industry and industry group totals because of the inclusion of materials transferred from one establishment to another for mineral preparation or resale.

Professional, Scientific, and Technical Services; Administrative and Support and Waste Management and Remediation Services; Educational Services; Health Care and Social Assistance; Arts, Entertainment, and Recreation; and Other Services (Except Public Administration) sectors - **TAXABLE ESTABLISHMENTS:** Includes receipts from customers or clients for services rendered, from the use of facilities, and from merchandise sold whether or not payment was received. For advertising agencies, travel industries, and other service establishments operating on a commission basis, receipts include commissions, fees, and other operating income, NOT gross billings and sales. Excise taxes on gasoline, liquor, tobacco, etc., which are paid by the manufacturer or wholesaler and passed on in the cost of goods purchased by the service establishment are also included. The establishments share of receipts from departments, concessions, and vending and amusement machines operated by others are included as part of receipts. Receipts also include the total value of service contracts, market value of compensation received in lieu of cash, amounts received for work subcontracted to others, and dues and assessments from members and affiliates. Receipts from services provided to foreign customers from U.S. locations, including services preformed for foreign parent firms, subsidiaries, and branches are included.

Receipts are net after deductions for refunds and allowances for merchandise returned by customers. Receipts DO NOT include sales, occupancy, admissions, or other taxes collected from customers and remitted directly by the firm to a local, state, or Federal tax agency, nor do they include income from such sources as contributions, gifts, and grants; dividends, interest, and investments; or sale or rental of real estate. Also excluded are receipts (gross) of departments and concessions which are operated by others; sales of used Material rented or leased to customers; domestic intracompany transfers; receipts of foreign subsidiaries; and other nonoperating income, such as royalties, franchise fees, etc. Receipts DO NOT include service receipts of manufacturers, wholesalers, retail establishments, or other businesses whose primary activity is other than service. They do, however, include receipts other than from services rendered (e.g., sale of merchandise to individuals or other businesses) by establishments primarily engaged in performing services and classified in the service industries.

**TAX EXEMPT ESTABLISHMENTS:** Includes revenue from customers or clients for services rendered and merchandise, whether or not payment was received, and gross sales of merchandise, minus returns and allowances. Also included are income from interest, dividends, gross rents (including display space rentals and share of receipts from departments operated by other companies), gross contributions, gifts, grants (whether or not restricted for use in operations), royalties, dues and assessments from members and affiliates, commissions earned from the sale of merchandise owned by others (including commissions from vending machine operators), and gross receipts from fundraising activities. Receipts from taxable business activities of firms exempt from Federal income tax (unrelated business income) are also included in revenue. Revenue DOES NOT include sales, admissions, or other taxes collected by the organization from

# Appendix

customers or clients and paid directly to a local, state, or Federal tax agency; income from the sale of real estate, investments, or other assets (except inventory held for resale); gross receipts of departments, concessions, etc., that are operated by others; and amounts transferred to operating funds from capital or reserve funds.

**Real Estate and Rental and Leasing sector** - Includes revenue from all business activities whether or not payment was received in the census year, including commissions and fees from all sources, rents, net investment income, interest, dividends, and royalties. Revenue from leasing property marketed under operating leases is included. Revenue also includes the total value of service contracts, amounts received for work subcontracted to others, and rents from real property sublet to others.

Revenue does not include sales and other taxes collected from customers and remitted directly by the firm to a local, state, or Federal tax agency.

**Retail Trade sector** - Includes merchandise sold for cash or credit at retail and wholesale by establishments primarily engaged in retail trade; amounts received from customers for layaway purchases; receipts from rental of vehicles, Material, instruments, tools, etc.; receipts for delivery, installation, maintenance, repair, alteration, storage, and other services; the total value of service contracts; and gasoline, liquor, tobacco, and other excise taxes which are paid by the manufacturer or wholesaler and passed on to the retailer. Sales are net after deductions for refunds and allowances for merchandise returned by customers. Trade-in allowances are not deducted from sales. Sales do not include carrying or other credit charges; sales (or other) taxes collected from customers and forwarded to taxing authorities; gross sales and receipts of departments or concessions operated by other companies; and commissions or receipts from the sale of government lottery tickets.

Sales do not include retail sales made by manufacturers, wholesalers, service establishments, or other businesses whose primary activity is other than retail trade. They do include receipts other than from the sale of merchandise at retail, e.g., service receipts, sales to industrial users, and sales to other retailers, by establishments primarily engaged in retail trade.

**Transportation and Warehousing sector** - Includes revenue from all business activities whether or not payment was received in the census year, including commissions and fees for arranging the transportation of freight. Revenue does not include sales and other taxes collected from customers and remitted directly by the firm to a local, state, or Federal tax agency.

**Utilities sector** - Includes revenue from all business activities whether or not payment was received in the census year.

Revenue does not include sales and other taxes collected from customers and remitted directly by the firm to a local, state, or Federal tax agency.

**Accommodation and Foodservices sector** - Includes sales from customers for services rendered, from the use of facilities, and from merchandise sold. Also includes dues and assessments from members and affiliates. Sales do not include carrying or other credit charges; sales (or other) taxes collected from customers and forwarded to taxing authorities; gross sales and receipts of departments or concessions operated by other companies; and commissions or receipts from the sale of government lottery tickets.

Excludes sales from civic and social organizations, amusement and recreation parks, theaters, and other recreation or entertainment facilities providing food and beverage services.

## Number of Employees

### General Definition

Paid employees consists of full-time and part-time employees, including salaried officers and executives of corporations. Included are employees on paid sick leave, paid holidays, and paid vacations; not included are proprietors and partners of unincorporated businesses. The definition of paid employees is the same as that used on IRS Form 941.

### Sector-Specific Information

**Construction and Manufacturing sectors.** Comprises all full-time and part-time employees on the payrolls of establishments who worked or received pay for any part of the pay period including the 12th of March, May, August, and November, divided by 4.

**Finance and Insurance sector.** Includes all employees who were on the payroll during the pay period including March 12. Excludes independent (nonemployee) agents.

**Information; Professional, Scientific, and Technical Services; Administrative and Support and Waste Management and Remediation Services; Educational Services; Health Care and Social Assistance; Arts, Entertainment, and Recreation; and Other Services (Except Public Administration) sectors** - Includes all

# Appendix

employees who were on the payroll during the pay period including March 12. Includes members of a professional service organization or association which operates under state professional corporation statutes and files a corporate Federal income tax return. Excludes employees of departments or concessions operated by other companies at the establishment.

**Management of Companies and Enterprises sector.** Includes all employees who were on the payroll during the pay period including March 12.

**Mining sector.** Also included are employees working for miners paid on a per ton, car, or yard basis. Excluded are employees at the mine but on the payroll of another employer (such as employees of contractors) and employees at company stores, boardinghouses, bunkhouses, and recreational centers. Also excluded are members of the Armed Forces and pensioners carried on the active rolls but not working during the period. Includes all employees who were on the payroll during the pay period including March 12.

**Real Estate and Rental and Leasing sector.** Includes all employees who were on the payroll during the pay period including March 12. Excludes independent (nonemployee) agents.

**Retail Trade and Accommodation and Foodservices sectors.** Includes all employees on the payroll during the pay period including March 12. Excludes employees of departments or concessions operated by other companies at the establishment.

**Transportation and Warehousing sector.** Includes all employees who were on the payroll during the pay period including March 12.

**Utilities sector.** Includes all employees who were on the payroll during the pay period including March 12.